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ABSTRACT

This environmental scan is designed to assist Ontario's colleges in their strategic planning processes. Ontario's colleges have supported a 35% increase in enrollment, with a 40% decrease in funding, over the last ten years, while operating costs have risen. In addition, Ontario eliminated the secondary school Ontario Academic Courses (OACs), which often kept high school students in secondary school for an extra year. The first wave of students who are exempted from the OACs are expected to graduate in 2003, the same year as the last class that is not exempted. This class (the double cohort) will create a temporary enrollment increase. Enrollment will also rise due to increased population and participation. Total additional employees required as a result of increased enrollment is estimated at 7,114, including faculty, administration, and staff. The colleges also aim to facilitate economic development, to improve the current 91% graduate employment rate, and to develop new programs that are responsive to local, regional, and provincial needs. The paper reports on enrollment changes by division (Arts, Business, Health, Technology) over the years between 1995-2001. The paper also reports on distance learning, apprenticeship training, adult literacy in Ontario, Ontario's demographics, international students, economy, labor, succession planning, and student retention, among other issues. Includes tables, graphs, and references for each of the seven sections and appendices. (NB)

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November 2001

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INTRODUCTION

The Association of Colleges of Applied Arts and Technology of Ontario (ACAATO) is pleased to present the eighth edition of *The Environmental Scan.*

The challenges faced by colleges as we move into this new century include keeping pace with technology and knowledge explosion, continuing to meet the myriad needs of an increasingly diverse student body, remaining economically viable and responding to the local community that has become increasingly global in nature. The future will belong to those who can successfully meet these challenges.

The 2002 Environmental Scan is designed to assist colleges in their strategic planning processes. The scan is intended to provide an overview of the environment to facilitate planning, discussion and analysis. It is not an exhaustive or in-depth study but where possible, references have been provided for those who would like to access further information.

To facilitate public access to this valuable resource, the 2002 edition of the scan is available on the ACAATO web site at:

http://www.acaato.on.ca/new/research/scan/2002/2002.htm.

This scan provides links to additional resources available on the ACAATO website as well as other websites.

ACAATO has prepared the *2002 Environmental Scan* on your behalf and we welcome your feedback on the usefulness of this document in your advocacy and planning activities. A response sheet is also provided on page 175 for your convenience.

Pam Derks
Director, Research and Policy

Jocelyn Dekter
Senior Research Officer

LEARNERS AND LEARNER PROFILES

Section One

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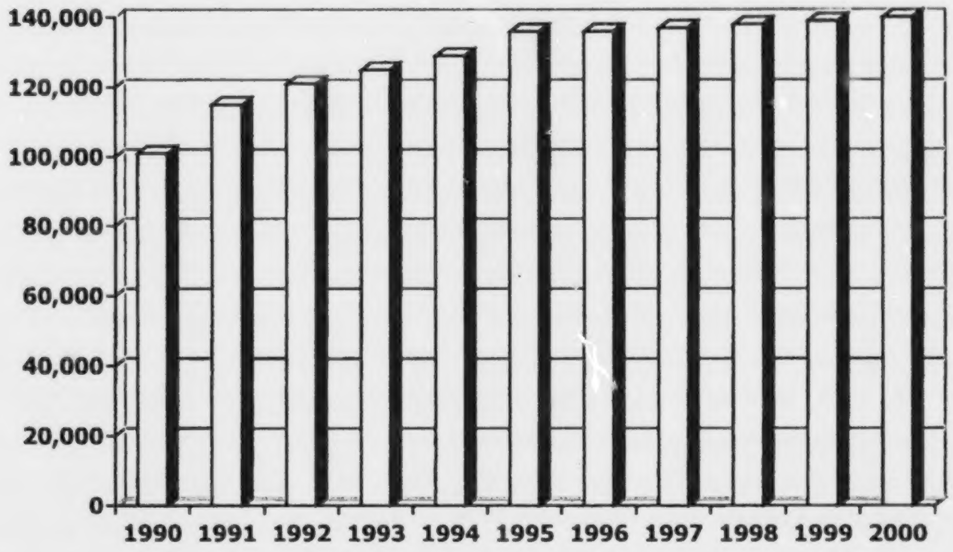
Full-Time Postsecondary Enrolment in Ontario Colleges

Profiling the college learner is not an exact science. We can surmise from statistics and trends in what form they arrive on our doorstep, whether virtually or in person; whether burdened with economic concerns or juggling full-time work and study; or facing barriers of language; poor foundation skills; or venturing, for the first time, away from home. A learner-centred environment recognizes that diversity of background and builds the bridges to meaningful learning.

Full-Time Postsecondary Enrolment in Ontario Colleges



- In 2000, 139,466 full-time postsecondary students enrolled in Ontario's colleges, a 35% increase since 1990.
- Overall college full-time postsecondary enrolment remained relatively similar between 1998-1999 and 2000-2001, rising by less than 1%. It is projected that enrolments for the double cohort years (2003 – 2005) will rise to 168,609, or an increase of 22.8%
- Over one-third of working adults are taking a course.[1]

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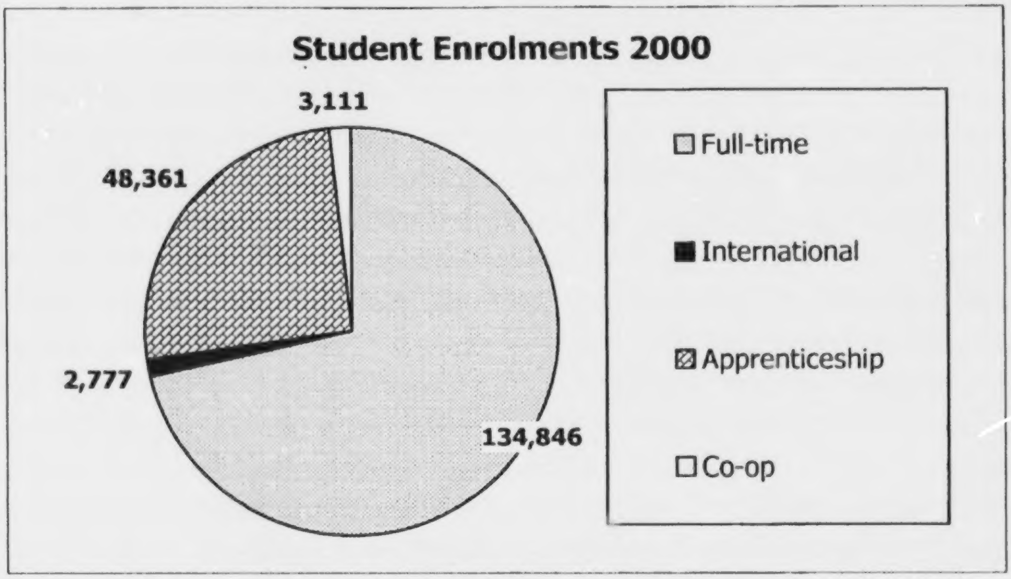
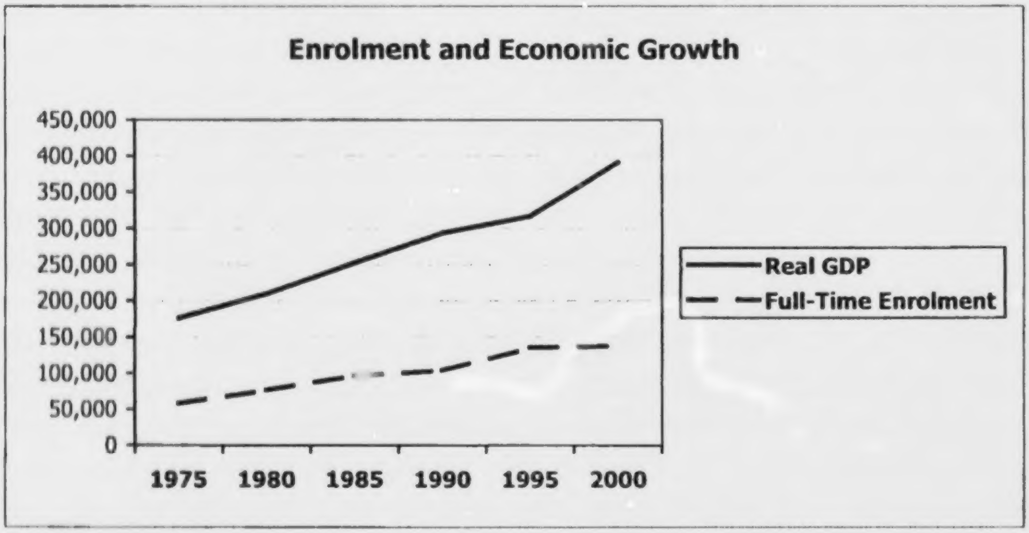
[1] Public Attitudes Towards Education in Ontario 2001: The 13th OISE/UT Survey, Key Highlights



Counter Cyclical Nature of College Enrolment

- Both college enrolment and real GDP have a trend line of growth between 1975 and 2000 although college enrolment has grown slightly faster.
- College enrolment growth spurts have come at times when the economy has gone into a downturn and stabilized when the economy has improved.
- College enrolment also follows the generally counter cyclical pattern of youth employment.



POSTSECONDARY ENROLMENT HIGHLIGHTS BY YEAR IN PER CENT FROM 1995-2000

- There has been virtually no change from 1995 to 2000 in first-year registrants, representing approximately 56% of total registrations.
- Second-year enrolment consistently represents approximately 34% of total enrolment.
- Third-year registrants have represent approximately 10% of total college registration.

POSTSECONDARY ENROLMENTS BY YEAR - 2001

- As of March 1, 2001, there has been 0.5% growth in first-year enrolments system-wide, from 76,137 in 2000 to 76,487.
- As of March 1, 2001, there has been a 0.5% decline in second-year enrolments system-wide, from 40,299 in 2000 to 40,108.
- As of March 1, 2001, third-year enrolments have increased 2.4% system-wide from 13,949 in 2000 to 14,282.

POSTSECONDARY REGISTRATIONS BY DIVISION, INCLUDING HRDC, OTHER SPONSORED, AND INTERNATIONAL STUDENTS

	1995	**1996**	**1997**	**1998**	**1999**	**2000**	**As of March 1, 2001***
Arts	49,989	47,820	48,469	47,169	47,665	47,598	45,597
Business	42,932	44,675	46,596	47,395	47,578	45,429	43,857
Health	14,561	14,386	12,542	12,905	14,065	15,389	14,845
Technology	28,398	29,247	30,237	30,651	30,158	29,391	26,578

Source: Ontario College Application Service (OCAS)
Note: * March 01 enrolments are not final numbers – enrolments will continue.

ENROLMENT CHANGES BY DIVISION

- Enrolment in the **Arts** division in 2000 experienced a 4.60% decline since 1995.
- The **Business** division realised the most growth of the four divisions in 2000, with a 5.8% increase since 1995. This is consistent with the rapid growth in the business services and information technology sectors of the economy.
- **Health Sciences** is undergoing tremendous growth, with an increase of 9.41% from 1999 to 2000.
- **Technology** division enrolments have increased 3.4% since 1995, but dropped slightly from 1999 to 2000.

INTERNATIONAL STUDENT ENROLMENT BY YEAR AS OF MARCH 1, 2001

Applied Arts:	1st Year: 579	2nd Year: 187	3rd Year: 37
Business:	1st Year: 1,095	2nd Year: 432	3rd Year: 82
Health:	1st Year: 19	2nd Year: 4	3rd Year: 3
Technology:	1st Year: 297	2nd Year: 105	3rd Year: 39

2000 Applicants: Current Secondary School Student	
Yes	54,581
No	92,473

Source: Ontario College Application Service (OCAS)

CATCHMENT AREA STATISTICS

First Year Students Attending Local College or Outside Colleges	**1999**	**2000**
Total Ontario residents who leave their catchment area to attend another college (NOT including French colleges)	34,726	32,687
Total Ontario residents who stay in their catchment area to attend college (NOT including French colleges)	38,467	59,335
Total Non-Ontario residents who attend an English college	1,093	1,409
Total Ontario residents who attend a French college	2,417	3,507
Total Non-Ontario residents that attend a French college	592	1,026

Source: Ontario College Application Service (OCAS)

Registrations are measured as distinct individuals, while
Enrolments are combinations of students equalling one Full Time Equivalent (FTE).
Confirmed Acceptances is a measure of applicants who have received an offer of admission and have returned a confirmation of acceptance in a particular program.

ENGLISH COLLEGE CATCHMENT AREA POSTSECONDARY CONFIRMED ACCEPTANCES, 2000

(excluding HRDC, Other Sponsored and International Students)

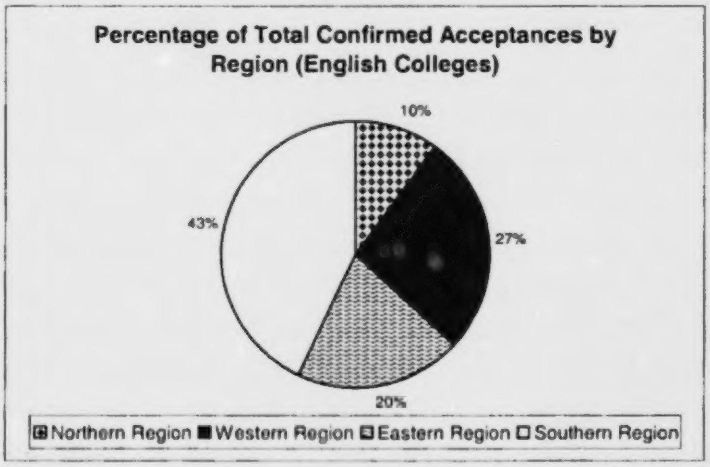
College	Total Number of Enrolments	Total Number From Catchment Area	% From Catchment Area	% From Outside Catchment
Algonquin	6717	5117	76.18%	23.82%
Cambrian	2583	1793	69.41%	30.59%
Canadore	2021	740	36.62%	63.38%
Centennial	6358	4485	70.54%	29.46%
Confederation	1870	1655	88.50%	11.50%
Conestoga	3283	2480	75.54%	24.46%
Durham	3473	2499	71.96%	28.04%
Fanshawe	7520	4138	55.03%	44.97%
Georgian	3422	1838	53.71%	46.29%
George Brown	6592	4015	60.91%	39.09%
Humber	6715	2476	36.87%	63.13%
Lambton	1471	1040	70.70%	29.30%
Loyalist	1839	1072	58.29%	41.71%
Mohawk	5267	3151	59.83%	40.17%
Niagara	3842	2602	67.73%	32.27%
Northern	889	606	68.17%	31.83%
St. Clair	3872	3488	90.08%	9.92%
St. Lawrence	2766	1784	64.50%	35.50%
Sault	1422	992	69.76%	30.24%
Seneca	10412	7951	76.36%	23.64%
Sheridan	6242	3999	64.06%	35.94%
Sir Sandford Fleming	3448	1414	41.01%	58.99%
Totals	**92024**	**59335**	**60.80%**	**39.20%**

Source: Compiled from Ontario College Application Services Data.

TOTAL COLLEGE ENROLMENT 1998 – 2000
(including HRDC, Other Sponsored and International Students)

College	1998	1999	2000
Algonquin	10434	10447	10451
Borèal	1375	1240	1097
Cambrian	3738	3622	3478
Canadore	2746	2667	2603
Centennial	10210	10414	9555
Confederation	3197	3228	3073
Conestoga	4258	4467	4639
Durham	4409	4649	4826
Fanshawe	8595	8899	9188
Georgian	5071	5268	5442
George Brown	8999	9094	9150
Humber	11276	12071	11917
La Cité	3473	3499	3347
Grand Lacs	134	127	89
Lambton	2422	2366	2149
Loyalist	2872	2869	2839
Mohawk	7432	7132	7592
Niagara	4887	4821	4832
Northern	1457	1381	1293
St. Clair	5343	5375	5222
St. Lawrence	4751	4747	4583
Sault	2594	2484	2138
Seneca	13518	13428	13880
Sheridan	9762	10001	9388
Sir Sandford Fleming	5167	5170	5036
Totals	**138120**	**139466**	**137807**

Source: Compiled from Ontario College Application Services Data.


Percentage of Total Confirmed Acceptances by Region (English Colleges)

FULL-TIME POSTSECONDARY ENROLMENT IN ONTARIO COLLEGES

Year	FTPS Enrolment excluding CEIC, and International Students	FTPS Enrolment including CEIC, and International Students
1976	not available	58,757
1977		61,094
1978		64,793
1979		70,508
1980		76,585
1981		81,599
1982		90,692
1983	95,107	97,239
1984	96,855	98,859
1985	94,266	96,269
1986	93,474	95,118
1987	94,911	96,191
1988	94,150	95,051
1989	97,347	98,080
1990	102,998	103,598
1991	113,594	114,398
1992	121,919	122,745
1993	125,238	127,526
1994	129,857	132,071
1995	134,127	135,880
1996	134,409	136,128
1997	135,831	137,844
1998	136,170	138,820
1999	137,342	139,466
2000	134,846	137,807

Sources:
1976-1994 enrolment figures from Ontario Ministry of Education and Training CAAT2 report (November 1st student count)
1995 – 2000 enrolment figures from Ontario College Application Service November 1 survey of colleges

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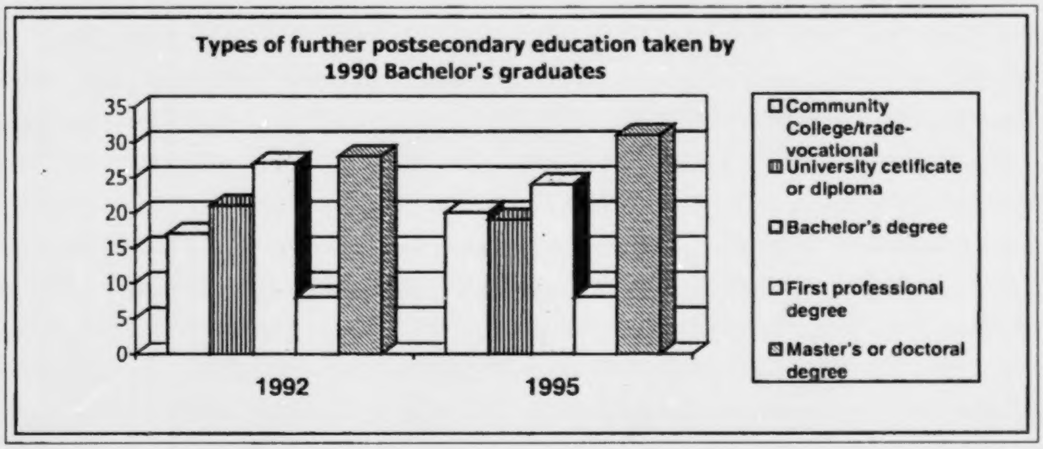
Colleges and Universities

A CUCC research project estimated 5% to 6% of applications for admission to university come from college students/graduates and that 7% of college admission applications come from university student/graduates. *See the Education and Training section of this Scan for more information about the Transfer Guide.*



Note: The 1990 bachelor's population was restricted to graduates with the following characteristics: their previous level of education was high school or community college/CEGEP; their age at graduation was 26 or younger; and they had started their bachelor's programs between 1984 and 1987.

Sources: Statistics Canada, Education Quarterly Review, 2001, Vol. 7, No. 2: *1992 National Graduates Survey and 1995 Follow-up Survey.*

- The odds of earning higher pay increase for each degree earned by an individual. In a report by Statistics Canada examining the distribution of wealth in Canada, the key measure was the median net worth of Canadian families. The median net worth was $81,000. This means that half of Canadian families have a net worth greater than that figure, and half less than that figure.
- A key contributor for those who fall below the median, is less education. At the bottom are those families in which the main income earner didn't complete high school; their median net worth came to $62,500. High school graduates fared better at $67,770 and the median wealth for those who have a further certificate of some kind was $78,700. For the most part, the territory above the $81,000 line was reserved for people who completed university.
- The odds of being wealthy increase almost exponentially with every additional degree earned.

Globe and Mail, March 26, 2001.

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Awards – Scholarships, Grants, Loans, Bursary and Assistance Programs

In an effort to remove financial barriers and to assist students with the burden of tuition for postsecondary education, a number of interests have developed bursaries, awards, scholarships and grants. Each fund has its own eligibility requirements and stipulations for use. The value of the awards vary widely and are payable at different stages in a student's education. Many awards are contingent upon income and current debt, while others are based on academic merit. It is a complex and often confusing array of opportunities. Following are some awards administered by the Ontario Student Assistance Program:

Canada
- 2000 – 2001 Canada Millennium Bursary
- Part-time Canada Student Loan
- Canada Study Grants for: students with dependants; students with disabilities; high-need part time students; for women in doctoral studies

Ontario
- 2001 – 2002 Aiming for the Top Scholarship (ATOP)
- Ontario Student Opportunity Grant (formerly the Loan Forgiveness Program)
- Ontario Special Bursary Plan
- Ontario Works Study Plan
- Interest Relief Program
- Bursary for Students with Disabilities
- 2000-2001 Bursary Support for Deaf Students Studying at Out-of-Country Postsecondary Institutions
- Child-Care Bursary

Complete guidelines and details of each award are available on the OSAP website:
http://osap.gov.on.ca/eng/not_secure/general.htm#Loans

Ontario Student Loan Recipients and Defaults by Student Characteristics for Ontario Colleges 1999 and 2000

Student Characteristic	**Default Rates in Percentage**	
	1999	**2000**
Age 24 and under	19.1%	17.7%
Age 25 and over	21.4%	16.4%
Gender – Male	24.1%	19.6%
Gender – Female	16.5%	15.2%
Non-Withdrawal	17.0%	15.5%
Withdrawals	36.9%	37.9%
Interest Relief Program Participants		
1 Term	16.3%	13.9%
2 Terms	8.1%	4.9%
3 Terms	2.5%	0.7%

ONTARIO STUDENT ASSISTANCE PROGRAM – COLLEGE TRENDS

Levels of Student Assistance and Number of Recipients:

Year	Canada Student Loan (Current $)	Ontario Student Loan (Current $)	No. of College OSAP Recipients	Total Full-time Postsecondary Enrolment	% of Total
1990 – 91	65,751,663	9,581,334	42,326	102,998	41%
1991 – 92	104,116,627	16,255,093	51,038	113,594	45%
1992 – 93	123,343,781	20,697,160	59,612	121,919	49%
1993 – 94	187,008,735	151,935,794	64,450	125,238	51%
1994 – 95	204,333,872	175,783,629	71,560	129,857	55%
1995 – 96	215,629,393	185,478,505	73,096	134,127	54%
1996 – 97	260,511,404	241,772,883	72,329	143,409	54%
1997 – 98	267,928,680	246,830,445	71,885	135,831	53%
1998 – 99	253,665,820	210,114,562	68,539	136,170	50%
1999 – 00**	236,765,028	195,673,536	63,767	137,342	46%
2000 – 01***	208,400,244	175,446,527	55,648	135,136	41%

Notes: * Excludes, other, sponsored and international students.
** As of July 8, 2000
*** As of July 7, 2001

Source: Ministry of Training, Colleges and Universities, Student Support Branch

Number of Awards by Student Group

Student Group	1995-96	1996-97	1997-98	1998-99	1999-2000*	2000-01*
Dependent at Home	11,279	12,070	13,505	13,133	12,981	11,283
Dependent Away	16,329	16,625	18,123	18,479	17,884	15,541
Independent**	29,333	27,970	24,677	21,147	18,131	15,668
Married	6,886	7,067	6,916	6,993	6,646	5,998
Sole Support	9,227	8,581	8,573	8,690	8,036	7,087
Other	42	16	91	97	89	71
Total	73,096	72,329	71,885	68,539	63,767	55,648

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Number of Awards by Student Group and Institution

2000 – 2001*	Married/Sole Support		Independent**		Dependent	
	#	%	#	%	#	%
Colleges of Applied Arts and Technology	13,085	23.5%	15,668	28.2%	26,824	48.3%
Universities	7,859	10.1%	23,629	30.2%	46,704	59.7%
Private Vocational Schools	5,505	46.1%	3,925	32.9%	2,513	21.0%

Notes:
*As of July 7, 2001-07-10
**Includes students who qualify as independent students under the Canada Student Loans Program and dependent students under the Ontario Student Loans Program.
Source: Ministry of Training, Colleges and Universities, Student Support Branch.

Average Loan Amount by Student Group

Student Group	1995-96	1996-97	1997-98	1998-99	1999-2000*	2000-01**
Dependent at Home	3,220	3,419	3,124	3,051	3,167	3,146
Dependent Away	5,472	5,632	6,072	5,802	5,896	6,089
Independent***	6,101	6,357	6,485	6,218	6,222	6,384
Married	6,063	14,003	15,083	13,371	13,335	13,400
Sole Support	5,318	7,967	6,949	7,084	6,410	6,358
Other	5,318	7,967	6,949	7,084	6,410	6,358
Total	5,487	6,944	7,161	6,767	6,782	6,898

Notes:
*Canada Student Loans and Ontario Student Loans divided by number of awards. Students may receive an Ontario Student Opportunity Grant (OSOG) for the portion of the loan that exceeds $7000.
** As of July 8, 2000 for 1999-2000 data. As of July 7, 2001 for 2000-01 data.
*** Includes students who qualify as independent students under the Ontario Student Loans Program.
**** Does not include value of Canada Study Grants for students with dependants introduced in 1998-99
Source: Ministry of Training, Colleges and Universities, Student Support Branch.

ONTARIO STUDENT ASSISTANCE PROGRAM – What's New

- In November 2000, OSAP began an income verification process to ensure accuracy of information provided by students on their loan applications.
- Bill 19, Ontario Student Loan harmonization Act, includes the precept that banks, credit unions, and caisses populaires will no longer administer funds for the Canada Student Loans Program. Instead one division of the National Loans Service Centre is responsible for serving borrowers attending postsecondary institutions. The other division will serve borrowers attending private vocational institutions. Canada Post will be accepting loan documentation.

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ONTARIO STUDENT LOAN RECIPIENTS AND DEFAULTS

Ontario Colleges of Applied Arts and Technology, Private Vocational Schools, and Other Public and Private Institutions
1999 and 2000

Institution	Number of Loans 1996/97	Number of Loans 1997/98	Defaults 1999	Defaults 2000	Default Rate 1999	Default Rate 2000
Universities	33,802	30,218	2,855	2,140	8.4%	7.1%
Colleges of Applied Arts and Technology	35,559	31,567	7,132	5,419	20.1%	17.2%
Private Vocational Schools	21,453	16,783	6,648	4,844	31.0%	28.9%
Other Public and Private Institutions	922	826	73	53	7.9%	6.4%

- Column 1 and 2 refer to the number of Ontario Student Loans issued in a specific year and not in the subsequent year.
- Column 3 and 4 were issued an Ontario Student Loan in years of columns 1 and 2 respectively. Default dates were July of selected years.
- The default rate was the number of loans in default as a percentage of the number of loans issued.

To date the ministry's measures to reduce the incidence and cost of loan defaults include:

- Sharing the cost of loan defaults
- Reporting program outcomes
- Ontario Student Opportunity Grant
- Credit screening
- Interest relief
- Income verification
- Closing the bankruptcy loophole
- Offsets against personal income tax refunds.

Vocational Schools

There are approximately 600 private vocational schools registered with the Ministry of Training, Colleges and Universities. Career colleges offer fast-tracked programs that target high-employment sectors of the economy and sometimes compete directly with publicly funded community colleges.

While obtaining a diploma at a community college requires a two or three-year commitment, the career colleges are a quick-in, quick-out experience. In return, students can pick up training and job contacts in areas often associated with the new economy. Tuition can be steep, however. The top-drawer colleges charge $5,000 to $10,000, with high-tech programs ranging higher than $20,000 for a 3 to 12-month study period.[2]

Since the well publicised collapse of career colleges in the past few years the Ontario Ministry of Training, Colleges and Universities license colleges that offer diplomas under the Private Vocational Schools Act. Curriculum, faculty and facilities are regulated with each school having to re-register annually. Under the act, colleges have to post bonds to cover refunds to students in the event that a school shuts down.

Differences between community colleges and vocational schools, apart from tuition costs, include regular course start-ups and generally smaller class sizes of the vocational schools. However, with constant intake, students often find themselves joining a class in progress, which means a juggling act for faculty to bring new students up-to-speed with the rest of the class.

International Students

Some of the colleges, particularly in the Central Region, are experiencing an increasing number of International Student enrolments. To study in Canada, students must apply for authorization prior to entry.

Visit the ACAATO Website (www.acaato.on.ca/new/research/scan/2002/webonly/) to view a chart showing the country of last permanent residence for students applying for authorization to study in Canada.

As the following chart demonstrates, a significant number of hopeful students do not receive authorization to study in Canada.

2000 Student Cases Processed Overseas – All World Regions	
Applications Received	81,578
Authorizations Issued	64,243
Applications Refused	12,449
Refusal Rate in % Based on Finalized Cases	16.45%

Source: CAIPS offices – Produced by Operational Co-ordination (RIM) on Jan. 30, 2001, Citizenship and Immigration Canada.

Boomers as Students

"Workers in general have more access to the continuing education they need to be employable. New technologies have meant more workplace education has had to happen, and learning institutes have contributed with distance education programs.
We are seeing a shift from machines, buildings and capital as being companies' most valued commodities, to the employee's intellectual capital as being the most valued asset," says David Harris of Watson Wyatt World-wide."[3]

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[2] Source: Brian Dexter, "Career Colleges, Ministry Offer Tuition Protections", The Toronto Star, April 27, 2000.

[3] National Post Business, December, 2000.

Participation in Adult Education and Continuing Education

- According to the 13th OISE/UT Survey the participation rate in 2000 has climbed to 29% from 25%, which is a return to levels of the early 1990's. This is a similar result found by Statistics Canada in the 1998 Adult Education and Training Survey which reported the total percentage of the adult Canadian population involved in adult education or training activities to be 28%.
- In the same OISE/UT survey, over one third of adults working full-time reported taking a course, while those working part-time participated at a rate of 36%.
- Those who have a higher level of formal education are much more likely to take courses and those who are older are less likely.
- Adult course participation in Canada is primarily job-related, with 60% of the respondents to the 13th OISE/UT Survey indicating that the course was taken either to prepare for a new job or to help them with their current job.
- According to a report based on the 1998 Adult Education and Training Survey, a joint project of Statistics Canada and Human Resources Development Canada, overall participation rates were much lower for older individuals. Only 15% of those 55 to 64 and 5% of those 65 and over participated in adult education and training activities, compared with 30% for all other age groups.
- Older people also spent fewer hours on training. Those aged 55 to 64 devoted an average of 49 hours to adult education in 1997, compared with 451 hours for the youngest aged group, 17 to 24.

Surveys

Highlights of the following surveys can be found on the ACAATO website at:

http://www.acaato.on.ca/new/research/scan/2002/webonly/

- **Lifelong Learning: Self-directed Learning –** 1998 General Social Survey – Canadian Social Trends Spring 2001
- **Reader's Digest Poll –** public opinion survey, Canadian teenagers are optimistic about their future
- **Values of Youth –** Canadian youth data – Angus Reid Group's "Youthscape"
- **Young Canadians Expect To Financially Support Aging Parents: -** 10th Annual Royal Bank Financial Group RRSP Survey © 2000 Ipsos-Reid
- **Youthful activities: How the young while away the time –** Angus Reid World Monitor, Fourth Quarter, 2000
- **Internet users' habits** – Microsoft Network Survey
- **E-Trends –** The Globe and Mail, Feb 15, 2001 – Technology T-3

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EDUCATION AND TRAINING

Section Two

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In the Learners section we looked at some of the characteristics of college students. This section provides a snapshot of how and where bridges are built from previous schooling to the successful completion of postsecondary education. We are, however, living in dynamic times. Education at every level is under some type of reform and training has never been more of a workplace requirement, nor more in demand. The methods we employ to teach our learners require collaboration, innovation, and constant renewal.

Public Attitudes Toward Education in Ontario 2001: The 13th OISE/UT Survey Highlights

- Nearly three-quarters of Ontarians support increased spending for all levels of public education – a significant increase since 1996.
- Increased spending for job retraining and adult literacy continues to be strong.
- Corporate executives, people over 55, other occupational groups and young people who were once strongly opposed to increased funding, are now strong supporters.
- There is widespread consensus that postsecondary education bears too great a personal financial cost.
- There is recognition among Ontarians that lower income groups have a lower chance of obtaining a postsecondary education.
- According to various accountability measures, Ontario now has the lowest ranking in Canada.
- Fewer people today think there is a mismatch between the education they have, and that required in order to do their jobs.
- The OISE/UT survey is in agreement with the 1998 Angus Reid poll, which indicated that a college diploma in a technical occupation was the most valuable form of education, followed by a university degree in science and an apprenticeship in a skilled trade.
- Over one-third of employed adults are taking a course.
- Over half the respondents received credit for their course.
- Over 80% of the courses taken included face-to-face instruction. Self-study was the second most popular method of education.
- The primary reason listed for not taking a course was insufficient time.

Question asked: "What do you think would be the most valuable type of education to have in the workplace 10 years from now?"*	**Public 1998[a]**	**Public 2000**	**Parents 2000**	**Teachers 2000**
	%			
University degree in science	18	24	27	16
University degree in arts	3	5	6	8
College diploma in a technical occupation	35	27	30	22
Professional graduate degree, such as law or social work	5	5	3	7
Apprenticeship in skilled trade	24	18	17	17
High school education and lots of on the job training	13	11	11	9
Can't say	2	10	7	22
Number of Respondents	1000	1002	271	497

[a] Ernst and Young survey conducted by Angus Reid (May, 1998)

* This question was used in the 2000 OISE/UT Survey as well and the findings supported the earlier Ernst & Young Survey

Elementary/Secondary School Reform

Elementary

School Enrolments

- Began decreasing in 1996-97.
- The Canadian enrolment of 5.4 million students in 1998-99 is still below the all-time high of 5.8 million attained in 1970-71.
- In 1998-99, there were 1,195,170 students in enrolled in grades 1 through 8 in Ontario.

2001 Quality Education – New Curriculum Highlights

- First new kindergarten program in 50 years
- Elementary students learn reading, writing and math skills at an earlier age.
- The new four-year high school curriculum prepares students for work or further training or study.
- Technology is taught in every elementary grade.
- Clear standards help parents understand what students should be learning in each grade.
- A standardized testing program has been implemented, giving educators important information about where progress is being made and where improvements are needed.
- New school council regulations to ensure that parents have a stronger voice in their children's education
- A 'teacher testing' program to ensure that teachers keep developing and improving their skills.

Education Reform in the U.S.

- On June 14, 2001 the Senate and House of Representatives approved a bill for education reform. The core principles of the new education agenda include: accountability, flexibility, local control and more choices for parents.
- U.S. school children will have to pass frequent reading and math tests and be taught by certified teachers or their schools will lose federal funding.

Jan Cienski, National Post. June 16, 2001. pg. A13

Secondary

Secondary School Enrolments and Graduates

- In 1998-99, 658,163 youth were enrolled in secondary school programs in Ontario. (This number includes estimates for private schools and OAC students).
- In 1999, 116,193 students graduated from secondary school in Ontario. (This number excludes night school and correspondence courses for adults).

✳ *For details of Secondary School Curriculum Reform, developed in May 2000, visit the website:* http://mettowas21.edu.gov.on.ca:80/eng/document/nr/00.06/currbg7.html

Results of the First Grade 10 Literacy Testing

Results of the first system-wide standardized testing of Grade 10 students were released in March, 2001. None of the test results were counted toward student grades as this was a trial run. Although there was a great deal of debate about the methodologies employed and excuses made for the poor performance results, it was clear that in order to raise the level of achievement in secondary school, students must be able to meet the minimum standards of literacy.

- 29% of students failed at least one of the reading and writing portions of the test and 13% failed both.
- 61% passed,
- 10% did not take the test.
- 69% of girls passed
- 55% of boys passed
- 51% of French-language students passed; 43% failed

Ontario Youth Apprenticeship Program (OYAP)

- OYAP offers Ontario secondary school students the opportunity to train as apprentices while enrolled in school.
- It allows students to complete his or her Ontario Secondary School Diploma (OSSD) and to gain apprenticeship training leading to a Certificate or Qualification with journeyperson status in a skilled trade.
- Hours worked on the job are applied to journeyperson certification.

Prior Learning Assessment and Recognition (PLAR)

Secondary school students may receive a credit without taking a course if they can demonstrate that they have the skills and knowledge from prior learning to meet the expectations for the course set out in the provincial curriculum.
To receive a credit through the PLAR process, students are assessed through a formal test, along with other methods of evaluation appropriate to the subject.
The PLAR process applies only to courses in Grades 10–12.

Does new policy on flunking make the grade?[4]

Ontario is to tighten the rules for passing from grade to grade. Queen's Park announced it would order schools to pass only those who know their stuff – and that one way to measure this could be with new grade-by-grade tests.

However, OISE curriculum professor John Ross, warned that failing a grade boosts a child's chance of dropping out by 40%.

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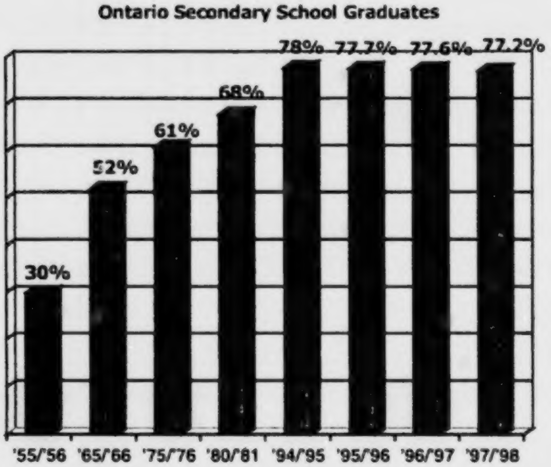
[4] Toronto Star May 6, 2001 – front page. Source: Ministry of Education (Toronto Star Graphic).



Some fear Ontario's planned rules for passing and failing could boost the dropout rate and reverse the steady climb in the percentage of children who graduate from high school.

"Majorities of both teachers and parents say they disagree with "social promotion", the practice of passing students who have not mastered all the material at one grade level on to the next grade in order to keep them with their own age group. However, teachers are much less likely than the public (13 versus 48 per cent) to think province-wide testing will have an impact on student achievement at the elementary level. They are more likely than the public (70 versus 50 per cent) to think students' final grades at the secondary level should be determined by their teachers' assessments, not province-wide tests." OISE 13th Survey

✳ *For information on High School Dropout Rates and Characteristics of school leavers, visit:*

http://www.acaato.on.ca/new/research/scan/2002/webonly/

Ontario's Secondary School Report Card

The Fraser Institute, a Vancouver-based economic think-tank, evaluated Ontario's high schools using data from the provincial Ministry of Education for the years 1994 to 1999. The Fraser Institute's *Report Card on Ontario's Secondary Schools*, analyzed 815 schools, from which only 568 were ranked.

Sixteen Private schools tied for top spot, but publicly funded schools made up more than half of the top 10%. The average report card score was 6.2 out of a possible 10 points.

Meanwhile, the Education and Quality and Accountability Office (EQAO), the arm's-length provincial government agency, plans to release its own report on schools next fall. Its Education Quality Indicators Program will provide information on 22 different aspects of a school's environment – including demographics and teaching methods – as well as provincial test results. The EQAO has not decided whether it will grant the public access to individual school results or make the information available only to school boards.[5]

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[5] National Post, Report Card, Section F, April 18, 2001

Postsecondary Education

Industry Canada Education Indicators

- In 1990, 20% of those aged 25 to 29 in Canada had less than high school education. By 1998, that percentage had dropped to 13%. Also, between 1990 and 1998, the percentage of individuals in this age group who had university degrees rose from 17% to 26%. Internationally, among member nations of the Organization for Economic Co-operation and Development (OECD), Canada had the highest percentage of the population (48%) with postsecondary education in 1995, compared with the OECD average of 23%.
- This information is based on a new report of the Pan-Canadian Education Indicators Program (PCEIP). The PCEIP is a joint initiative of Statistics Canada and the Ministers of Education, Canada, in collaboration with the provincial and territorial ministries responsible for education and training. (Feb. 22, 2000)

College-University Collaboration[6]

In 1999, the Council of Ontario Universities, ACAATO and MET signed the Ontario College-University Degree Completion Accord (the Port Hope Accord) committing universities and colleges to develop degree completion arrangements on a voluntary basis.

- Governments in Ontario have generally left the role of co-ordination of college-university relations to the postsecondary institutions themselves. Over the years, individual Ontario colleges and universities have established a variety of formal and informal methods to recognize the learning of students from the other sector. In addition, some institutions have established joint programs and formal agreements in specific program areas.
- Most of the existing collaboration between colleges and universities is in the area of credit transfer and degree completion. As of July 2000, institutions had reported approximately:

    - 583 credit transfer agreements;
    - 304 degree completion programs at universities;
    - 9 joint/integrated programs;
    - 24 concurrent/consecutive programs; and
    - 110 degree completion agreements between community colleges and postsecondary institutions outside Ontario.

Note: These figures do not sum to the number of total agreements, because several institutions reported the same agreement.

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[6] College-University Collaboration, A Background Paper, prepared for the College-University Consortium Council, August 25, 2000

CUCC Mission Statement

"To facilitate, promote and co-ordinate joint education and training ventures that will: aid the transfer of students from sector to sector; facilitate the creation of joint programs between colleges and universities; and, further the development of a more seamless continuum of postsecondary education in Ontario."

The Ontario College-University Transfer Guide

"The Ontario College-University Transfer Guide provides an online searchable database describing credit transfer agreements between Ontario's colleges and universities as well as programs that have been collaboratively developed. Users can search by college or university, by geographic area, by type of collaborative program or by keyword. The Transfer Guide will respond with a list of the programs that match the user's search criteria, including links to more detailed information." (OCUTG Brochure)

✱ The website: *www.ocutg.on.ca* went 'live' on April 9th, 2001.

Distance Learning

Contact North/Contact Nord

Contact North is non-profit corporation and network of 145 distance education and training access centres. Funded by the Government of Ontario, for over 14 years Contact North has continued to provide access for many thousands of learners to secondary school and postsecondary programs and courses, in English and in French, in small and remote communities. By using audioconference, audiographics and videoconference technologies, the Contact North/Contact Nord network serves not only the educational sector, but is increasingly being used by public and private sector organizations conducting their business at a distance.

- Includes access to all information on educational partners through the network's local access centres. Connects Northern Ontario businesses, industry and governmental organizations for meetings, training sessions, consultations and other events
- Partners with Northern Ontario secondary schools, postsecondary institutions, the Independent Learning Centre, Centre AlphaPlus Centre, Apprenticeship and Basic Skills Groups, and TVOntario
- Provides program and course information and technical assistance to students at local access centres

OntarioLearn.com

Formerly known as Contact South, OntarioLearn ended 2000-01 on a positive note. In addition to implementing a name change, two new partner colleges have joined, student enrolment has increased by 44% and the number of courses available to students continues to increase.

The consortium remains focused on the issue of quality. Course evaluation data is collected each semester and a Course Review process has been implemented. OntarioLearn.com (OL) now includes a total of 22 Ontario Colleges of Applied Arts and Technology.

Enrolment has increased more than 44% over the previous fiscal year. The enrolment total for the 2000-01 fiscal year was 11,242 (unaudited). Contributing factors for this increase in activity are: additional partner colleges; a growing course inventory; and repeat students.

Trade and Vocational Statistics

- In 1997-98, 250,000 Canadian trainees were enrolled in trade/vocational programs in public trade schools and community colleges.
    - 45% were in prevocational programs
    - 35% were in pre-employment programs
    - 17% were in programs for registered apprentices
    - 3% were in skills upgrading

In 1997-98, 61,581 trainees (including apprentices) were enrolled in programs in Ontario.

Apprenticeship Training

Trade shortages are looming. The Advisory Council on Science and Technology (an expert panel on skills) found that demand will outweigh supply in most trades, particularly in the automotive and aerospace sectors.

Visit the website for the entire report: http://acst-ccst.gc.ca/skills/home_e.html

There is a serious image problem for trades: Parents tend to want their children to have a university education. "The average age of journeymen in Canada is over 48 years old. That means that in the next seven to 10 years, there's going to be almost a 100-per-cent turnover in those skilled workers. We have to start training our young people now and change attitudes."[7]

"Apprenticeship needs to be promoted to meet the growing demand for workers in trades such as construction. Apprenticeship and training in the trades is treated as second class alongside the new "knowledge industries," and focus group participants stated that this has to change. Fostering a culture of apprenticeship that respects and promotes the need and value of trades is needed." Toronto Training Board, 2000 – 2001 Environmental Scan

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[7] Ken Georgetti, Canadian Labour Congress leader. Labour Chief Predicts Skills "Crisis." The Ottawa Citizen, August 19, 2000.

Apprenticeship Innovation Fund

In the May 2000 Budget, the Ontario government committed $5 million annually over three years to support the expansion of the apprenticeship training system and help maintain high quality and consistent standards. The fund is designed to help colleges move toward outcome-geared learning, standardized exams and exemption exams which will allow for recognition of existing experience and make for easier credit transfers between colleges. This year's awards invested $1.3 million in updating classroom training standards for apprentices in 11 trades or occupations, such as automotive service technician, farm equipment technician and construction and maintenance electrician. Funds are also being provided to assess apprentices prior learning achievements and avoid duplicating their classroom training.

In addition, the awards invest in the creation of classroom curriculum for six new trades including automotive electronic accessory technician, educational assistant and surface blaster.

The remaining $3.7 million is invested to:

- develop flexible, alternative methods for delivering apprenticeship classroom training;
- create a comprehensive assessment system to help apprentices complete classroom training;
- encourage more partnerships between industry and apprenticeship training deliverers;
- foster greater integration of apprenticeship in-school programs with postsecondary courses and with the Ontario Youth Apprenticeship Program; and
- develop and revise additional curriculum standards, prior learning examinations and translate program materials into French.

For a complete listing of Apprenticeship Innovation Fund awards, including: project, amount awarded and college involvement, visit the website: http://www.edu.gov.on.ca/eng/document/nr/01.01/nr0102.html

Apprenticeship Reform

The Ontario government is now negotiating a Labour Market Development Agreement with the federal government that will secure some Employment Insurance funds for financial assistance to apprentices. When an agreement is reached, it will ensure that the apprenticeship training system will not only be preserved, but also expanded and strengthened.

With a federal-provincial agreement in place, the Ontario government can implement its plan to improve labour market programs to meet the priorities of Ontario's economy, and the needs of employers, workers and people looking for work.

The Ontario government invests $40 million a year to cover the costs of administering the apprenticeship training system – including registering employers and apprentices, developing standards and working with industry advisors. The total also includes the about one-third of classroom training costs paid by the province for apprentices who are not receiving Employment Insurance.

In August 2000,

- 16,012 active apprentices were in the construction sector;
- 9,092 were in the Industrial sector;
- 10,944 were in the motive power sector;
- 6,777 were in the service sector; and 5,536 were classified as "other". (Ministry of Training, Colleges and Universities)
- Last year, the Ontario Ministry of Training, Colleges and Universities contributed up to $342 500 to match industry contributions supporting Skills Canada-Ontario and the Ontario Technological Skills Competition. The competition was organised by *Skills Canada-Ontario*, a volunteer organisation of employers, educators and trainers dedicated to helping young people to develop workplace skills.

Inter-provincial Standards "National Red Seal Program"

Under the terms of the Canadian Constitution, each province and territory has the responsibility for apprenticeship training. The legislation permits each jurisdiction to designate occupations for apprenticeship. Those designated trades are governed by regulations under the Provincial and Territorial Apprenticeship Act. Nation-wide forty-four apprenticeable trades are designated as Red Seal Trades.

✳ Visit the Human Resources Development Canada website for more information and links: http://www.hrdc-drhc.gc.ca/hrib/hrp-prh/redseal/

Local Training Boards

Under the Local Training Boards Initiative, up to 25 new boards are being set up across Ontario to play a leadership role in local labour force development. Sponsored by the Ministry of Training, Colleges and Universities, Human Resources Development Canada (HRDC), and the Canadian Labour Force Development Board (CLFDB), these boards bring together representatives from local labour market partner groups to work with government (federal, provincial and municipal) for the improvement of the community training and adjustment system. The local training boards have a broad mandate including:

- advising governments on existing training and adjustment programs
- providing direction on the purchase of training programs and services
- advocating life-long learning, improved access to training opportunities
- adopting of national and provincial training standards

LITERACY

In her opening speech to a national roundtable on building a culture of innovation and entrepreneurialism, Jane Stewart, Minister of Human Resources Development Canada, remarked that eight million Canadians lack the basic literacy skills needed to participate fully in the knowledge economy.[8]

The first **International Adult Literacy Survey** (IALS), An International Comparative Study, measured literacy levels of 22 countries between 1994 and 1998. The findings confirm that literacy is an important issue in all regions and countries surveyed. As a component of that survey, the Canadian adult population aged 16 to 65 were interviewed and tested at home using the same literacy test. Detailed exercises were developed to test understanding and the use of printed information in daily activities at home, at work and in the community.

The survey categorised literacy into five broad levels. Level 1 was the lowest literacy and Level 5 the highest. Almost three out of five Canadians (over 10.5 million) had sufficient prose, document and numeric literacy skills to meet most everyday requirements. One in four Canadians had Level 2 skills. About one in six Canadians (over 3.1 million) had severe difficulty dealing with printed material.

In 1994, it was found that working-age adults with weak Level 1 skills were less likely (59%) to have been employed during the year than those who had strong Level 4/5 skills (89%).[9]

Main Findings – Adult Literacy in Ontario:
The International Adult Literacy Survey Results

- Ontario has higher literacy levels than the national average; 55.8% of Ontario's adult population has sufficient literacy skills – the national average is 52.4%.
- Ontarians have higher numeric skills than Canada as a whole; 57% versus 52%.
- In Ontario, 20.2% of the adult population does not have basic literacy skills while a further 24% could be considered to have inadequate skills to meet the changing labour market needs.
- As in all other jurisdictions, literacy levels in Ontario decline after 45.
- Most graduates of secondary school have achieved level '3' literacy.
- Ontario's Francophone community has lower literacy results than the general population.
- There is little difference in results between men and women.

Education and Literacy

- Those who have had no secondary education are clustered in Level 1 on all scales.
- Those who have attended secondary school, but did not graduate, have the highest concentration in Level 2 on all scales, although 35% are at Level 3 or higher.

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[8] David Brown, Canadian HR Reporter, May 7, 2001, page 1

[9] Canadian Social Trends, Statistics Canada, Winter 2000, page 5

- Those who graduated from college have large numbers in Level 3, but the proportion in Level 4/5 is greater than in Level 2 and there are less than 10% in Level 1.
- University graduates are always clustered in Level 4/5 with very few in Levels 1 and 2.

The Literacy and Basic Skills (LBS) Program

The Ministry of Training, Colleges and Universities manages the LBS Program as a support for agencies that provide programs to improve literacy. The ministry provides more than $60 million to support delivery of the program at more than 300 sites, 72 of which are college sites, throughout Ontario. The Ontario government invests $60.5 million a year to serve 55,000 adult literacy and basic skills clients. Out of this budget, about $2 million is directed to supporting 66 projects to promote literacy in Ontario.

Project funding is used strategically to lever funds from other levels of government to support more activity. The Ontario government's investment of $2 million helps lever about $4 million from the federal government.

In 2000-01, there were 10,250 college literacy learners, including LBS and Ontario Basic Skills (OBS) IV.*
In 2000-01, 42% of participants in college LBS programs were male (3 704); 58% were female (5,173)*
Project values for 2000-01 put the entire provincial program (LBS and OBS IV) operating budget at $12,289,900 – a decrease of $678,630.*
In 2000-01, 2,505 college LBS participants received $682,241 for transportation and childcare costs.*
Training support dollars (for all provincial programs) are projected to decrease in 2000-01, to $480,450.**
Funds are decreasing even though the number of learners is projected to increase.**
Total contact hours delivered by colleges is 2,463,218 for 97% of contracted hours delivered. (Up from 91% in 1999-00).
19% of college participants listed employment as their goal upon entering the program. 74% listed further training. 7% listed personal reasons for taking the program.
4,664 of the total 8,868 participants were between the ages of 25 and 44.

Sources: 1. Literacy and Basic Skills College Sector Committee*
2. Memo from MTCU Workplace Preparation Branch to various agencies, as reported in Toronto Training Board 2000 – 2001 Environmental Scan.**

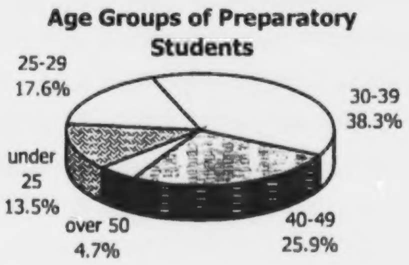
AlphaRoute

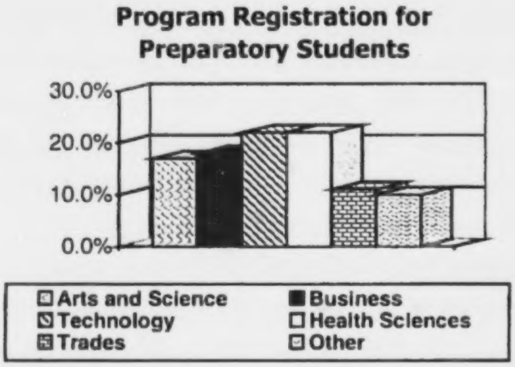
AlphaRoute is a computer-based, on-line literacy training system that allows learners to develop their basic skills through increasingly sophisticated learning activities and assignments under the guidance of a mentor. The system is the result of four years of development by the AlphaPlus Centre in Toronto with support from other literacy agencies across the province and financing from the Ontario government and the federal government.

Over the last four years, the Ontario government has invested more than $900,000 to develop AlphaRoute and its learning activities. When it is fully implemented, the on-line learning system will be accessible from any community in Ontario at any time of day.

Prepared for Success – A Study of College Preparatory Students in Postsecondary College Programs[10]

Preparatory programming has been part of delivery systems since the inception of the colleges. The primary supporter is the Ministry of Training, Colleges and Universities through the Literacy and Basic Skills Program. Ten colleges took part in the three-phase study of preparatory students.





Training in the New Economy

According to the Toronto Training Board's 2000-01 Environmental Scan, *"Training for Toronto's "New" Economy"*, some of the needs for training in the new economy are as follows:

- struggles in getting skills, getting jobs and getting ahead;
- realising that information technology (IT) is not in everyone's career path;
- meeting the demands of a fast-paced labour market;
- better understanding the implications of brain-drain/brain-gain circumstances and how to meet skill shortages;
- providing incentives and opportunities for skills training; and
- providing access to training dollars.

Focus groups for the Toronto Training Board identified the following gaps in training:
- bridging the gap between technical skills and core skills
- Lack of training options for Francophones
- Need to instil Internet savvy across all groups and sectors
- Lack of recognition for skills acquired outside of Canada

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[10] Literacy and Basic Skills College Sector Committee.

- Need for flexible training and assessment hours
- Need to integrate the existing work force into areas of industry demand
- Lack of entry-level training
- Considering the "necessity" for Grade 12
- Lack of supportive employment environments and opportunities
- Need to prevent erosion of the literacy and basic skills sector
- Need for vendor-neutral training environment for IT
- Lack of culture of apprenticeship
- Need to foster access for women to technology-related careers
- Need for more mentoring
- Need to replenish core funds for public training and assessment

Who's offering Adult Training?

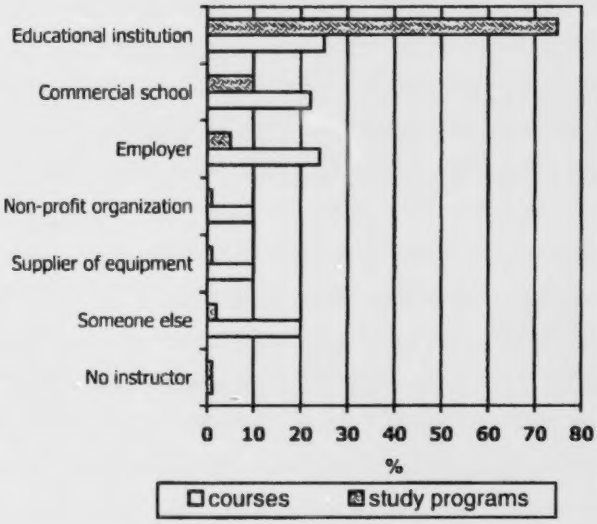
As noted in the *Report on Adult Education and Training in Canada: Learning a Living:* [11]

- Public education institutions offered three-quarters of all programs and one-quarter of all courses taken in 1997.
- Employers organised one in every five courses and close to one-third of job-related courses.
- Commercial schools provided 20% of courses taken for job-related reasons as well as 20% of those taken for personal interest.

Participation

- In 1997 more than 6 million people aged 17 and over, or nearly 28% of adults participated in education and training activities in Canada, down slightly from about 29% in 1991.
- 20% of unemployed workers participated in job-related education and training activities, compared with 29% of employed workers.
- Overall participation rates were lower for older age groups. Only 15% of those 55 to 64 and 5% of those 65 and over participated in adult education and training activities, versus more than 30% for all age groups.

Percentage distribution of adult education and training activities, by supplier and type of activity, 1997



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[11] Statistics Canada, The Daily, Thursday, May 10, 2001. From a report based on the 1998 Adult Education and Training Survey, a joint project of Statistics Canada and Human Resources Development Canada.

Barriers to Participation

- Six out of ten adults who wanted to take a course or training reported lack of time as a barrier.
- 40% of those who wanted to take a course but did not, reported cost, or lack of financial resources as well as inappropriate time or location of program offerings as a major barrier.

Employers' Role

- Employers play a crucial role in providing training programs. In 1997, employers subsidised formal learning for 26% of their employees. These employees accounted for 56% of all Canadian participants in adult education and training activities.
- Employer involvement varied by industry and size of firm. In 1997, workers in finance, utilities and public administration were more likely to receive employer-sponsored education than in other sectors.
- People working in large firms were twice as likely to get support from their employer as those in small firms.
- Employers were generally more inclined to sponsor white-collar workers than other workers, at almost 3:1.

Provincial Highlights of the Continuing Education Survey, Fall 2000:

- There were a total of 186,458 registrations in the fall term continuing education programs system-wide as of Nov. 15, 2000.
- There were 116,575 registrations of which 43% were surveyed from September 25 to November 17, 2000.
- 63% of students taking courses through continuing education are between the ages of 25 and 44.
- 66% of students are female.
- 80% of males are employed full-time; 66% of females are employed full-time.
- 75% of total students surveyed list English as their first language, 22% listed Other, and 3% listed French. (There were marked differences between Central Region colleges and those in the other three regions.)
- 91% of retired students are taking courses to pursue a hobby, interest or for personal development and fulfilment.
- 63% of continuing education students have already completed postsecondary education. 28% have already obtained a university degree, up 3% from 1996.
- 67% of students are taking Continuing Education courses for career related reasons.
- 39% are working on a Certificate, while 16% are working towards a Diploma.
- 68% selected 'traditional classroom' as their preferred method for taking a course, over 16% for mixed mode and 8% for Internet/web with e-mail support.

The federal government plans to help working Canadians pay for their own continuing education. Individual learning accounts will encourage people to invest in their own education. The government has also expressed a commitment to expand the part-time student loan program.

"As the transition to knowledge-based societies has accelerated, the need for higher level competencies for all has strengthened. In 1996, OECD Ministers for Education saw these needs emerging and adopted the common goal of *lifelong learning for all.* "[12]

- A lifelong learning culture has arrived. Most Ontario adults wanting to take more continuing education courses and adults in general spend more than 12 hours per week on informal learning activities (OISE/UT survey).
- 57% of the participants in the OISE/UT Survey indicated that they received credit for the courses they'd taken.
- 28% received a community college credit in 2000, down from 33% in 1998. University credits received by adult learners climbed from 17 percent in 1998 to 24 percent in 2000.
- In Canada, by 1999, the proportion of adult population with postsecondary credentials was estimated at 42.5%, and 28% of those adults were certificate or diploma holders.[13]

According to the **International Data Corporation**, the world-wide market for technology training has grown by about $2 billion U.S. annually since 1996. IDC estimates that corporate expenditures on training will reach close to $1.1 billion in Canada by 2002.

Ontario Colleges of Applied Arts and Technology and Corporate Employee Training

In a survey conducted by Forum Canada Research on behalf of ACAATO and the College Provincial Contract Training Network, with partial funding provided by the Sector Initiatives Fund, Ontario Ministry of Training, Colleges and Universities, 96% of the 626 corporate and public sector clients who used college resources for employee training said college-based programs contributed to the success of their organisations as quickly as within a few months.

Prosperity Demonstration Fund

The Ministry of Economic Development and Trade offers grants of up to $100,000 through the Prosperity Demonstration Fund, part of the Partners in Prosperity initiative, which is an element of the Ontario government's follow-up to the Ontario Jobs and Investment Board report, *A Road Map to Prosperity*.

- The fund supports small-scale, locally-driven partnerships that demonstrate innovative ways of advancing prosperity by promoting one or more of the five strategic goals set out in the OJIB report:
    - knowledge and skills for prosperity;
    - innovation culture;
    - strong global orientation;

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[12] Meeting of The OECD Education Ministers, Paris, April 2001.
[13] Statistics Canada, Education in Canada, 2000

- building on our industry and regional strengths;
- favourable investment climate

Strategic Skills Investment

Strategic Skills Investment is a $130 million program. The program supports the best projects that accelerate the introduction of forward-looking skills development collaborations between business and training providers. The focus is on: creating strategic skills essential for building business competitiveness and increasing the responsiveness of Ontario's training institutions to business needs. To date:

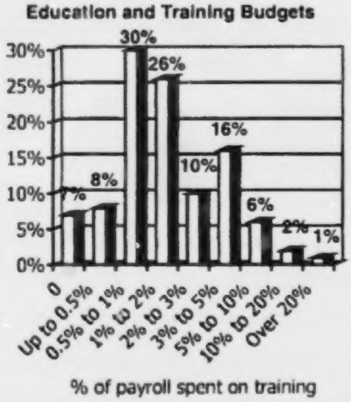
- 191 projects submitted;
- 45 community and economic clusters participated in approved projects;

some 60 community colleges, universities and other public and private sector training providers participated. Students/trainees enrolled in strategic skills programs will include: young people preparing to enter the full-time workforce, experienced workers seeking to expand their skills, unemployed and under-employed people reorienting their skills to qualify for good jobs in fast growing sectors.

Industry Training Trends

According to the Alliance Manufacturers and Exporters Canada, Management Issues Survey, about 39% of Canadian manufacturers and exporters spend 1% or less of payroll on education and skills development.

- Approximately 26% of companies spend up to 2% of payroll on education and training while another 26% spend between 2% and 5% of payroll. Slightly over 9% of companies spend more than 5%.
- A majority of companies expect to increase their training and education budgets in 2001, while about 45% expect further increases in 2002.
- Only 6% of companies reported that their training budgets were likely to shrink in both years.



A Statistics Canada paper, *Training as a Human Resource Strategy: The Response to Staff Shortages and Technological Change*, found that:

- Advanced technology users are more likely to have workers in highly-skilled occupations, to face greater shortages for these workers, and they are more likely to train workers in response to these shortages than are those companies that do not use advanced technologies.

- In response to the introduction of new advanced equipment, innovators are more likely to provide training than non-innovators. Interestingly, innovators are more likely to provide on-the-job training, and non-innovators are more likely to provide training in a classroom, either off-site or at the firm.
- The paper concluded that innovation requires new general cognitive skills that come from operating in an innovative environment. An innovative environment is one that involves improving the problem-solving capabilities of the workforce. These problem-solving capabilities are best gained by being in a learning-by-doing setting with hands on experience.

A *Globe and Mail* article entitled "More Businesses Learning how to Teach Employees" printed Monday March 5, 2001, reported that:

- KPMG Canada is now spending $22 million on employee learning – about $3,000 a person – and that's not just 'training'. "Learning," said Lorne Burns, chief human resources officer for KPMG LLP in Toronto, "is about developing a competent individual. How I get it isn't important, it's that I get it."
- The Toronto office of Sun Life Financial is visited weekly by a University of Toronto professor to deliver a two-hour class. One hour is company time and one hour is employee time, so it's a partnership. Employees can go on to get university credits in degree programs.
- The Toronto Dominion Bank has a vice-president of learning and development, with 60 staff.
- Arthur Andersen spends 6 % of revenue on employee education, and has bricks and mortar campus facilities in several countries.
- Janssen-Ortho has senior people teaching at Humber College, and students participate in co-op work terms. In addition, there are about 150 learning programs offered over the firm's intranet.

"The Bank of Montreal has taken corporate training to a higher level through its $50 million, seven-year-old Institute for Learning, one of the few stand-alone, dedicated corporate training facilities in the country. And, by pushing the boundaries of high-tech teaching tools, it has given new meaning to lifelong learning for its 33,000 employees. Corporate training (which is considered vital for companies competing in a global market place) comes in several guises – such as apprenticeships, on-the-job learning, mentoring and self-study."[14] The Bank of Montreal's institute:

- has a staff of between 85 and 120
- approximately 2/3 of the teachers are professional educators, professors or consultants
- 1/3 are "high-potential" bank staff, who have been seconded for a couple of years from their primary jobs.

The bank spends about $1,800 per employee on corporate training, which is almost double what other Canadian companies spend. According to the American Society for Training and development (ASTD), the 32 Canadian companies they surveyed in 1999 spent $971 per employee a year on corporate training. The survey found that:

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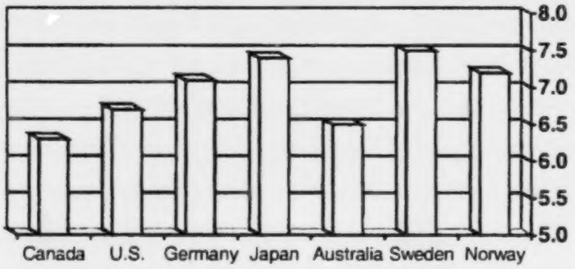
[14] Corporate Training's New Look, Globe and Mail, Globe Web Centre, Monday, March 5, 2001

- 78% of training is delivered in a classroom.
- Almost 10% of training is delivered through CD-ROMs or on-line.

Training Indexes
In 1997, employed women were more likely than men to participate in training designed to develop new skills and knowledge. However, the training time index, which compares the actual time spent in training, shows that, although women received less employer-supported training than men in 1997, they received more job-related training. This suggests that women compensate for less employer-sponsored training by paying for job-related training themselves and by taking it on their own time.
Statistics Canada, Canadian Social Trends, Spring 2001, No. 60, pg. 7

Employee Training a High Priority
1=not a high priority,10=a high priority



Source: *The World Competitiveness Yearbook 2000*, retrieved from Performance and Potential 2000, Conference Board of Canada

How does Canada perform globally?

Canada has one of the most highly educated populations in the world – 80% of our working-age people have completed secondary school, and a large portion go on to postsecondary training. This is an excellent record by international standards, but there are nagging doubts about the effectiveness of the system. International testing shows that our students are *not* holding their own on standardised mathematics tests.

- The Conference Board of Canada estimates show that the number of Canadians moving south each year has tripled to 100,000 people a year in the past three years.
- The demand seems to be markedly in the areas of law, finance services, computer sciences and MBA grads.

Education and Skills Performance[15]		
Canada's Record is . . .		*And the country with the best record is . . .*
Top Performer	High School completion Postsecondary education Computer access	United States Canada Australia
Average Performer	Incidence of employee-sponsored training	Sweden
Poor Performer	Unemployment rate of university graduates Literacy skills Mathematical test scores Participation in adult education	United States Sweden Japan Sweden

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[15] Conference Board of Canada Performance and Potential 2000

CON*NECT

Colleges of Ontario Network for Education and Training (CON*NECT) is a division of ACAATO that is used by business, industry and the public sector to access the training and development resources of the 25 Ontario colleges of applied arts and technology. The projected revenue for 2000-01 is $2 million.

As of January 31, 2001, CON*NECT has projects/contracts in place with organisations including: Ministry of Economic Trade and Development; Ministry of the Attorney General; Ministry of the Environment; Ministry of Training, Colleges and Universities; Ministry of Energy, Science and Technology; Shared Services Bureau, Ontario Public Service; Human Resources Development Canada; Industry Canada; Auto Parts Manufacturing Association; Ontario Aerospace Council; Canadian Insurance Self-Regulatory Organisation; Teranet Land Information Services; Canadian Urban Institute; Cummins Ontario; Ontario Investment Services; Financial Services Commission of Ontario; Office for Partnerships for Advanced Skills; ICDL Canada; Ontario Association of Certified Engineering, Technicians and Technologists; Ontario Community Newspaper Associations; and Canada Post/Canadian Union of Postal Workers.

CON*NECT will focus on the needs of four critical or high-growth sectors: auto parts manufacturing; food wholesale and retail trade; information technology; and transportation. The project is sponsored by the Ministry of Training, Colleges and Universities and is an initiative of the Prosperity Demonstration Fund, to assist CON*NECT in its mission to provide industry with a single point of access to college-based training programs.

In a recent CON*NECT survey of 972 corporate and public sector clients who used college resources in 2000 for employee training, 626 responded. Of those:

- Overall satisfaction rate - 87%.
- 88% were satisfied with the training received.
- 86% said they were almost certain/very likely to use college training again.

Highlights of *Technology and Student Success in Higher Education:* A Survey of Higher Education Teachers in Canada, 2nd Edition, 2000, (Total Sample N = 681)

Significance of Student Success:

- 94% of postsecondary faculty think that student success is "very" or "extremely" important to them.
- 66% think it is important to administrative staff and the private sector.
- 50% consider it important to the general public.

Teaching Objectives for Student Success:

- Postsecondary teachers who place a high value on developing students' critical and analytical thinking skills (99%).
- Postsecondary teachers who place a high value on ensuring students master a body of knowledge or a discipline (88%).

- University teachers who assign a high level of importance to practical objectives such as: preparing students for careers (44%); college teachers who assign a high level of importance to practical objectives such as: preparing students for careers (72%). This pattern reflects the traditional differences between the missions of colleges and universities.

Student Success: Activities, Tools and Obstacles:

- Traditional student performance indicators such as student work and scores are ranked most important.
- Feedback from and about students and graduates was ranked second.
- Outcomes such as awards and scholarships, job placement and student retention are ranked third.
- University faculty put a greater emphasis on awards and scholarships (51%), than did college faculty (32%).
- College faculty in turn put greater importance on job placement, graduate feedback and student retention.
- 96% of faculty members rank course preparation as "very" or "extremely" important for student success.
- Quizzes were the top-ranked course delivery tool, utilized by 70% of the survey participants.
- 58% of participants were "very" or "extremely" likely to use electronic presentations.
- Only 29% said they were likely to use the Internet.
- Class websites increased from 23% in 1999, to 57% in 2000.
- While distance education ranks second last in both 1999 and 2000 studies, it is noteworthy that the absolute level of distance education has nearly doubled from 1999 (12%) to 2000 (21%)

Challenges of Instructional Technology:

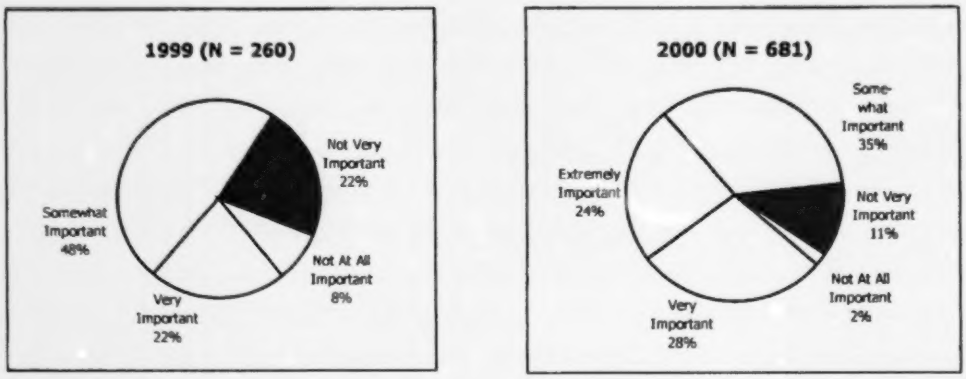
- Lack of support for integrating technology into curriculum (60%)
- Lack of support for hardware and software (59%)
- Lack of awareness about available technologies (51%)
- Lack of information about technology as a teaching tool (40%)

Where Faculty Learn about Instructional Technology:

- Peers, colleagues (79%)
- Conferences, seminars, workshops (53%)
- Educational publishers (37%)
- Educator websites (36%)

Importance of Instructional Technology for Student Success

*Some data comparison 1999 – 2000 is not possible due to slightly different measurement scales and differences in samples



> Canadian New Economy guru and consultant Don Tapscott, chairman of Toronto-based Digital 4Sight, which advises corporations and governments on new technologies, has his own spin on why the world needs an education revolution . . . "The Model of pedagogy and institutions is centuries old . . . I call it broadcast learning. But the solution is not about throwing technology into a classroom. It's about changing the paradigm from one-way learning, one-size-fits-all, teacher-focused education to interactive, highly customised, student-focused learning."
> *A Learning Revolution*, Diane Francis, Maclean's Magazine, March 5, 2001,

✳To read more about *Lifelong Learning for All -What it means to the high tech sector*, visit the website: http://www.shrc.ca/education/index.html

On June 18, 2001, *The National Post* reported that a series of proposals as part of the federal government's white paper on innovation, co-written by Human Resources Development Canada and Industry Canada, will recommend that government:

- Encourage individuals to retrain and pursue lifelong learning. A component of that is the tax-sheltered Registered Individual Learning Accounts;
- Reform part-time student loans, which are now used by only 3,200 people, compared with 350,000 full-time students;
- Create centres for "prior learning assessment" that would formally certify skilled workers who learned through informal training on the job, making them portable across jobs and across the country;
- Create a national system of credential recognition;
- Give incentives to private industry to make employee training a top priority (sector councils that bring together employers, unions and community colleges to develop curricula and training programs cover only 25 industry groups so far);
- Increase the number of skilled immigrants and speed the accreditation of their foreign training by provincial licensing bodies

(It takes skilled immigrants on average 10 years to regain the professional status they enjoyed in their home country);

- Bring into the labour force traditionally unemployed groups, particularly aboriginals, people with disabilities, people with low literacy skills and single parents.

College/University Nursing Program Collaborations

College(s)	University	Planned Enrolment September 2001 Intake
Loyalist College	Brock University	100
Cambrian and Sault Colleges	Laurentian University	185
Sir Sandford Fleming College	Trent University	80
Canadore College	Nippising University	25
Fanshawe College	Western University	200
Georgian, Durham and Seneca Colleges	York University	450
La Cité	Ottawa University	100
Algonquin College	Ottawa University	185
Mohawk and Conestoga Colleges	McMaster University	535
Lambton and St. Clair Colleges	U. of Windsor	270
Humber College	U. of New Brunswick	180
St. Lawrence College	Queen's University	150
Collège Boréal	Laurentian U.	26
George Brown and Centennial Colleges	Ryerson University	440

Source: Program Quality Unit, Colleges Branch, Ministry of Training, Colleges and Universities

College(s)	University	Planned Enrolment September 2002 Intake
Confederation College	Lakehead University	-
Northern College	Laurentian University	-

Source: Program Quality Unit, Colleges Branch, Ministry of Training, Colleges and Universities

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ECONOMY

Section Three

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"One can consider economic indicators as short-term measures of the efforts by current and former members of the population. On the other hand, social indicators are measures of the future health and capacity of our society. Without a high level of social health, there can be no sustained economic progress. If the health of our children deteriorates, our future economy deteriorates. Long-term economic progress cannot be maintained by an unhealthy, under-educated, and socially dysfunctional population. We may, perhaps, get away with it in the short-term, but if we are concerned about the future of Canada we must establish a set of measures to guide us."[16]

"Economic strength and quality of life are inseparable. Only a strong economy can generate the means to support important services like health care and education. And only a strong economy can give hard-working families the chance to build a brighter future."[17]

Quality of Life Indicators

CONFERENCE BOARD

Conference Board of Canada's *Quality of Life and National Key Performance Indicators*

"A quantitative measurement of the function of Canadian society can allow us to see ourselves in the light of key competitor's performance.

We compare Canada's performance on 40 key indicators in six priority areas:
1) economy, 2) labour markets, 3) innovation,
4) environment, 5) education and skills, and 6) health and society.

The breadth of these six areas underscores the point that both economic and social dimensions ultimately determine our quality of life – a wider goal than a sole focus on achieving a high economic standard of living."[18]

Socio – Economic Indicators	
Economy	6
Labour Markets	4
Innovation	6
Environment	4
Education and Skills	8
Health and society	12
Total Indicators	**40**

CANADIAN POLICY

The Canadian Policy Research Networks has developed *Indicators of Quality of Life in Canada: A Citizens' Prototype, A Summary of Results of Public Dialogue Sessions and Prototype of National Indicators, April 2001.*
These indicators also include 40 total indicators, but are organized under nine themes.

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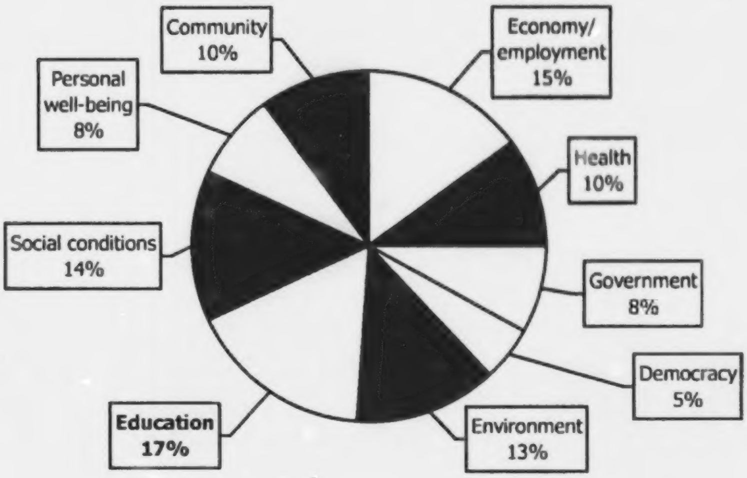
[16] Canadian Council on Social Development-Perception, Volume 20, No. 3, 1996

[17] Mike Harris, Ontario's Premier, Speech in Sudbury-April 27, 2001, Harris Outlines Plan for Economic Growth, Fiscal Responsibility and Accountability

[18] Conference Board of Canada, Performance and Potential, 2000 – 2001., pg. 4

While the Conference Board of Canada assigns a weighting of 20% to education with their key indicators of Canada's performance; **The Canadian Policy Research Network** has assigned education 17.5% of the total Quality of Life Indicators.

The Canadian Policy Research Network: 40 Quality of Life Indicators



Adapted from: Calvert-Henderson, *Quality of Life Indicators: A New Tool for Assessing National Trends,*[19]

WHAT DO THESE INDICATORS MEAN TO COLLEGES?

"Education is now the main barometer of competitiveness among countries – more than capital and more than technology. More than ever, learning is ultimately linked with wealth and well being of nations. It has become a linchpin in planning for Canada's future." -Jean Monty, Chairman and CEO, BCE Inc.

Innovation

"Innovation is a process through which additional economic value is extracted from knowledge – it is the successful execution and practical application of a new idea. Thus innovation is both a process and an outcome, a process that leverages fresh insights from existing knowledge in a way that results in new advantage. It is not only about technology and investment but also about creating organizational contexts, values and management systems that support the development of commercially viable ideas."[20]

- Innovation has become a key focus of policy makers with its positive impact on a country's economic growth.

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[19] Calvert-Henderson, *Quality of Life Indicators: A New Tool for Assessing National Trends,*[19] Hazel Henderson, Jon Lickeman and Patricia Flynn (editors), 2000

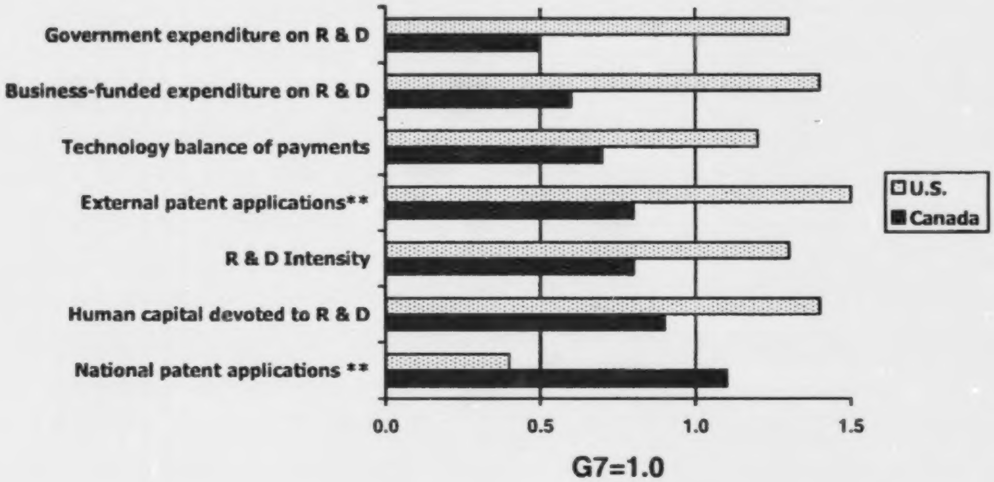
[20] Performance and Potential 2000 – 2001, Conference Board of Canada, page 7

- According to Industry Canada's Occasional Paper number 25, *The Economic Determinants of Innovation*, "the importance of innovation derives from the fact, that in the knowledge-based economy, the primary competition is competition to innovate first, not competition to cut prices."
- There is a significant innovation gap between Canada and our main competitor, the U.S.
- Although innovation indicators have been improving faster in Canada than most other G-7 countries, our ranking remains near the bottom.

"Canada's governments, educational institutions and granting agencies must work in concert to foster and support the creativity and innovation upon which success increasingly depends in the brave new world of DVDs, Auto-CAD, and bioengineering." [21]

CANADA'S INNOVATION CAPACITY

Innovation Standing relative to G-7, 1997



Source: *Canada in North America, Economic Opportunities and Challenges*, Micro-Economic Policy Analysis, Industry Canada. March 2001.

CANADA IS BEHIND THE UNITED STATES

1. Canada's standard of living has fallen to less than 80% of that enjoyed in the United States mostly because of weaker labour productivity, a new study by Andrew Sharpe says.

- Personal income per capita, the most commonly used measure of living standards, fell to 78.3% of that in United States last year from 87.2% a decade earlier, according to Andrew Sharpe, economist and head of the Ottawa-based Centre for the Study of Living Standards.
- After tax incomes calculates that in terms of disposable incomes, Canadian living standards have fallen to 70.3% of American living standards, from 79.3% in 1989.

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[21] Report, National Research Council, as reported in National Post, Friday, May 25, 01, pg. A1

- Although Canada's labour productivity grew in the last decade, it did not keep pace with the United States, which in the second half of the 1990s experienced a so-called "productivity miracle."
- Labour productivity per person, which is measured as the value of production or Gross Domestic Product – rose by an average 1.2% a year in Canada from 1989 – 2000. In the U.S. it was 1.9%.
- As a result, output per person in Canada fell from 85% of that in the U.S. in 1989 to 79% in 2000.

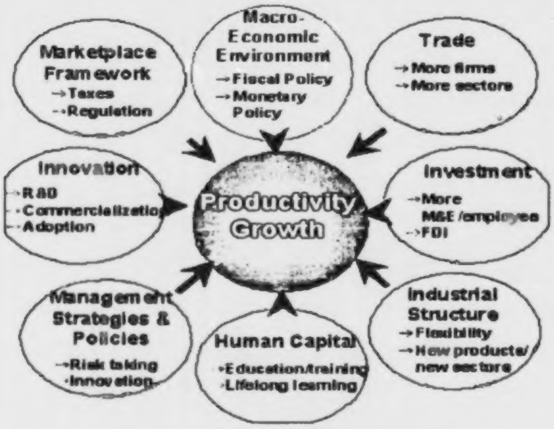
2. A report authored by Industry Canada, argues that the productivity gap reflects an innovation gap with the U.S., the evidence of which is seen in Canada's relatively lower research and development spending and the relatively fewer patents taken out by Canadians.

3. Statistics Canada said in February 2001 that productivity in both countries had grown at approximately the same rate during the past 40 years. Their study found that labour productivity or output per hour worked, grew an average 2% a year in Canada between 1961 and 1999.

4. Charles Baillie, TD bank, said Canada should set a goal of overtaking the living standard of the U.S. by a blend of federal and provincial tax cuts, debt reduction and greater spending on postsecondary education.[22]

5. Brian Tobin, the Industry Minister and Jane Stewart, the Human Resources Development Canada Minister, are drafting the federal government's blueprint for increasing productivity and in turn raising the living standards of Canadians. The proposals for improving productivity, increasing innovation and boosting the skills of workers will be released in a major government paper this fall (2001).[23]

What are the key drivers of productivity?


Marketplace Framework
→Taxes
→Regulation
Macro-Economic Environment
→Fiscal Policy
→Monetary Policy
Trade
→More firms
→More sectors
Innovation
→R&D
→Commercialization
→Adoption
Productivity Growth
Investment
→More M&E /employee
→FDI
Management Strategies & Policies
→Risk taking
→Innovation
Human Capital
→Education/training
→Lifelong learning
Industrial Structure
→Flexibility
→New products/ new sectors

"A nation's productivity performance, and its ability to make meaningful improvements, is dependent upon many different factors. These factors, or determinants of productivity, range from business decisions undertaken at the firm level in response to market and competitive forces to the structure, incentives and signals created by government policies."

Source: Industry Canada, June 14, 2001
strategis.ic.gc.ca/SSG/pr00016e.htm

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[22] National Post, May 7, 2001-05-11

[23] Eric Beauchesne, National Post, May 31, 2001, pg. A4

To close the Productivity Gap – Canada needs to develop corporate strategies geared to the knowledge-based economy. "In 2000, Canada's business environment was ranked eighth in the world by the World Economic Forum, down from fourth position in 1999. Among G-7 countries, Canada ranked third after the U.S. and Germany in 2000."

Source: *Global Competitiveness Report 2000*, Canada in North America, Industry Canada

Education and the Economy

- World-wide education expenditures are estimated at US $2 trillion.
- In 2000, Canada's educational service industries (including the public education system) was valued at $41 Billion, representing 5.2% of GDP.
- Half of Canadian suppliers are active in international markets. Through the export of its educational products and services, the industry makes a significant contribution to meeting global skills needs, particularly in emerging economies.
- Between 1996 and 1999, Canada's export of commercial education services grew annually by 17.5% to nearly $200 Million.[24]

Canada's Economic Growth

CANADA's ECONOMY IN BRIEF

Canada's Economy in Brief, March, 2001: Federal Department of Finance – Highlights

- The fourth quarter of 2000 represented the longest uninterrupted string of advances since the mid-1960s.
- The fourth quarter of 2000 continued to expand at a slower pace of 2.6% compared to increases above 4% in the previous quarters.
- GDP Growth for the year 2000 was 4.7%.
- Real GDP excluding inventories rose 5.3% (see Note 2. below)
- Domestic demand shifted to Canadian-made goods and services, which reduced real imports by 9.8%.
- Despite no gain in January, employment was more than 750,000 above the level of 1998.
- The unemployment rate in January 2001 was 6.9%.
- Labour productivity declined in the fourth quarter. Output per employed persons fell 0.4%, while output per hours worked, was down 0.6%.
- Nonetheless, productivity was nearly 2% higher than a year earlier. As a result, year-over-year unit labour cost grew modestly to 2.7%.
- The housing sector contracted for the third time in four quarters, dampened by poor weather. Exports edged down in volume despite soaring energy prices, due to weak demand for manufactured goods, particularly autos.
- Finally, business investment dipped, as spending on information technology slowed.

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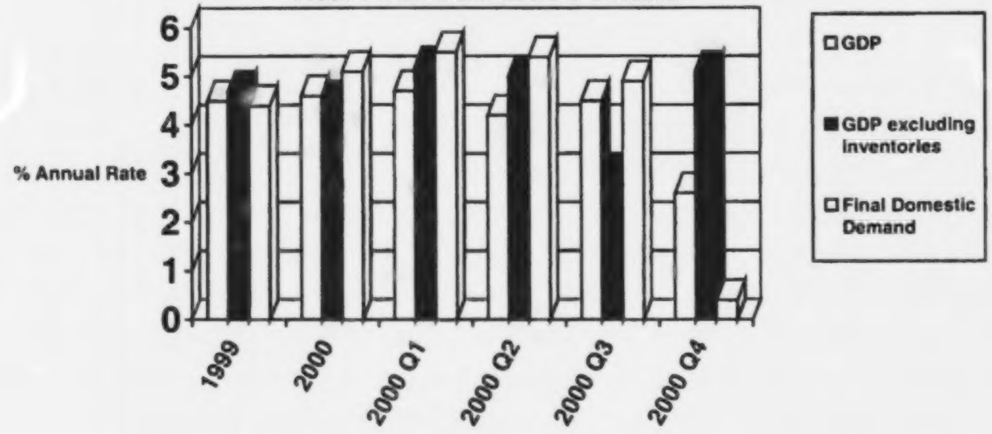
[24] Canadian Alliance of Education and Training Organizations, Industry Canada, April 2001

Canada's Growth in Real GDP and Real Final Domestic Demand



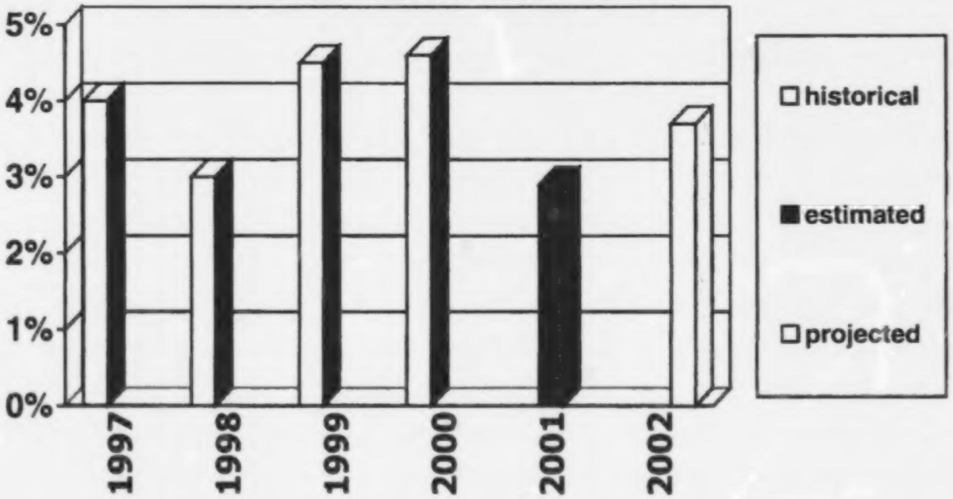
Source: Department of Finance, Canada.

Notes:

1. Final domestic demand is spending by Canadians on goods, services, housing, plant and equipment.
2. Real GDP values goods and services in any given year by using the prices of a set base period. By holding prices constant, real GDP measures only the changes in production from year to year. Changes in real GDP are used to measure economic growth.

Source: Royal Bank: Figures for 2001 are estimated; figures for 2002, projected

Canadian GDP Growth Rates



Per cent distribution of GDP 2000:

Primary sector: 1.8%; Secondary sector: 31.2%; Service sector: 67.0%.

- Canadians paid 2.9% more in Feb. 2001, than they did in February 2000 for goods and services included in the Consumer Price Index (CPI).
- This compares to a 3% year-over-year rise in January and a 3.2% advance in December
- Higher prices for food and energy were the major contributors to upward pressure on CPI, accounting for almost half the annual increase in February 2001– the highest 12-month advance since October 1995.
- Higher mortgage interest rates were also an important contributor to the overall 12-month increase.
- Lower prices for automotive vehicles, computer equipment and supplies, and video equipment exerted some downward pressure on the All-items CPI. From January 2001 to February 2001, the CPI rose 0.4% after declining 0.3% from December 2000 to January 2001.

TRENDS IN THE CONSUMER PRICE INDEX (1992=100)

	1996	1997	1998	1999
			Annual % change	
All items	**1.6**	**1.6**	**0.9**	**1.7**
Food	1.3	1.6	1.6	1.3
Shelter	0.2	0.2	0.4	1.4
Household operations and furnishing	2.1	1.2	1.5	0.7
Clothing and footwear	-0.3	1.3	1.2	1.3
Transportation	3.9	3.1	-0.8	3.3
Health and personal care	0.6	1.7	2.1	1.9
Recreation, education and reading	2.4	2.5	2.3	1.8
Alcoholic beverages and tobacco products	2.0	3.1	3.7	2.1

Last Modified: 2001 03 19
Source: Statistics Canada

LABOUR INCOME[1]	**1998**	**1999**	**Change**
	$ millions		**%**
Agriculture, fishing and trapping	3,846	3,767	-2.1
Logging and Forestry	2,984	3,013	1.0
Mines, quarries and oil wells	9,802	9,648	-1.6
Manufacturing	77,562	82,468	6.3
Construction	24,335	26,400	8.5
Transportation, storage, communication and utilities	37,332	39,160	4.9
Trade	60,633	64,138	5.8
Finance, insurance and real estate	38,137	40,104	5.2

LABOUR INCOME[1]	**1998**	**1999**	**Change**

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Community, business and personal services	134,867	141,937	5.2
Public Administration	29,692	30,743	3.5
[1] includes supplementary labour income.	**474,571**	**498,836**	**5.1**

Source: Statistics Canada

Global Economic Conditions

INTERNATIONAL TRADE

- Represents nearly 90% of Canadian GDP, the highest among the G-7 countries.
- The U.S. accounts for 83% of Canadian exports of goods and services and 72% of imports.
- Canada – U.S. trade now stands at $700 billion per year. With a value of C$475 billion last year, it was by far the world's largest trading relationship. The manufacturing economy of Ontario, the largest province, has boomed as a result of exports to the US.
- Two-way Canada-Europe trade totals over $40 billion annually (an amount that pales in comparison to our trade with U.S.)

FREE TRADE

- According to Industry Canada, *Free Trade* stimulates productivity through: increased competition; transfer of new knowledge and technologies; scale and scope economies; and increased specialization.
- Two-way trade between Canada and the U.S. has increased 80% since the North American Free Trade Agreement (NAFTA) was signed.
- The low Canadian dollar, a well-educated labour force and sophisticated infrastructure should make Canada one of the most attractive investment locations in the industrialised world. Yet Canada's share of North American direct investment has declined over the last decade as foreign companies opted for the bigger market in the US or cheaper labour in Mexico.
- Over 80% of Canada's Trade is with the U.S. Canada-U.S. trade is characterized by high levels of intra-firm trade; an increasing trend as result of the integration of North American economies following FTA and NAFTA."[25]
- Canada-Mexico trade reached $14 billion in 2000, a 500% increase over 1990 levels.
- Mexico now accounts for 3.4% of imports and 0.5% of exports.

GLOBAL GDP 2000-2001

- Germany – expected to advance by close to 3%
- France – expected to grow by 3.5%
- Italy – forecast to grow by more than 3%
- Austria, Belgium, Portugal, Spain, Finland and Greece are all expected to grow by more than 3%

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[25] Remarks by Charles A. Barrett, VP Business Research, conference board, to Sub-Committee on International Trade, Trade Disputes and Investment, of The Standing Committee on Foreign Affairs and International Trade, Ottawa, May 3, 2000

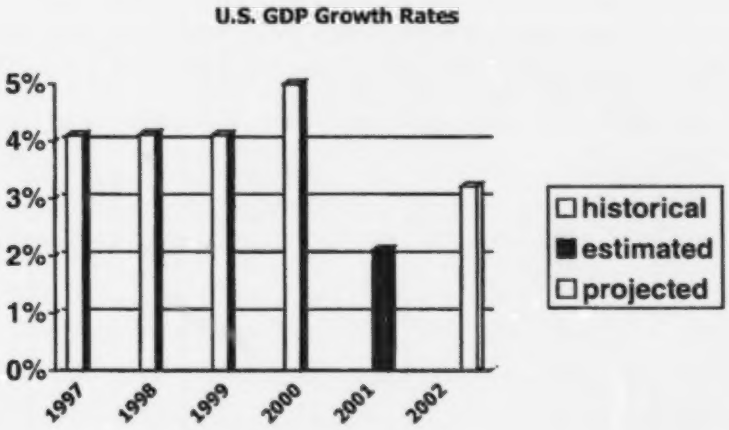
- United Kingdom - in deficit due to strength of sterling against Euro.
- Asia (all five countries)- growth of 7%

EUROPEAN MONETARY UNION (EMU)

EMU presents both benefits and risks for Europe and the global economy. Companies will enjoy a significant cost saving once exchange rate risks and conversion costs are eliminated. Fiscal prudence and monetary stability under the European Central Bank will help governments deal with fluctuations in the economy, while enabling more productive use of government funds, lower taxes and a more stable environment for business planning.
In contrast to trade, Canada has a growing investment presence in EU. In 1998, Canada's direct investment in EU totalled $46 billion, or more than 20% of foreign investment in Canada.

UNITED STATES

Trade with the U.S. is vitally important to the Canadian economy, representing 83% of all goods and services and 72% of all imports. Although the economy has expanded south of the border for the past 10 years, it's now moving into slower gear, according to IDC Canada's "*Semi-Annual Canadian Economic Outlook 2001.*"



Source: Royal Bank: Figures for 2001 are estimated: for 2002, projected

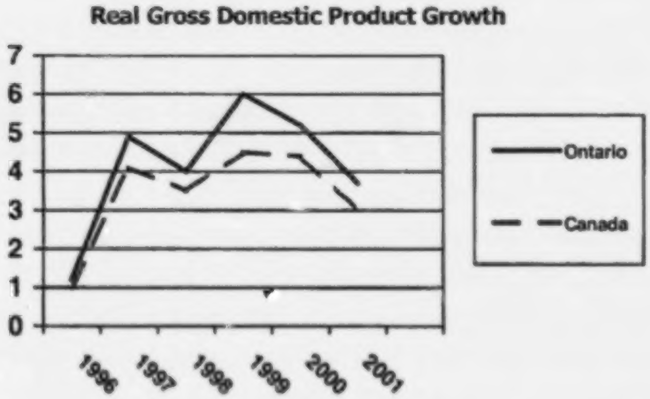
- The real U.S. GDP is expected to decrease from an estimated 2000 growth level of 5.1% year-over-year to a forecasted 2001 growth rate of between 2% and 2.5%. The U.S. GDP growth rate had fallen from 5.6 annualized per cent in Q2 to 1.4 per cent in Q4 2000.
- American job growth -- estimated to be 1.3% for the year 2000 has not occurred as rapidly as in previous years, and is expected to fall to 0.5 per cent in 2001.
- The unemployment rate cannot go much lower as the U.S. appears to have reached full employment levels. At this full employment rate, difficulty in fulfilling openings allow employees with high-demand skills to command higher salaries which has driven up wages as companies make every effort to recruit the best talent.
- The new American administration expects a budget surplus of US $250 billion and is likely to provide some fiscal stimulation with tax cuts and increased government spending.
- However, following the weak economic growth experienced in the second half of 2000, consumer spending is expected to slow in 2001.
- Of note - whether or not the U.S. economy has two consecutive quarters of contraction in GDP, it will be the general confidence of businesses and consumers that will determine the severity of the economic slowdown.

On May 31, 2001, Statistics Canada began shifting to a new way of measuring the nation's economic activity that will likely show the economy has been growing more slowly than previously thought, according to economists. The new method is also casting uncertainty over projections of future economic growth, they claim.

This new GDP measure is expected to widen the measured gap between the U.S. and Canada, but align the two countries' measurement methods. Since 1996 the United States has been using a method called the "Chain Fisher Volume Index," which updates prices each year; Canada has been measuring GDP using prices for goods and services from 1992 as a base year.

The impact of the switch to the Chain Fisher Volume Index reduces the estimated growth rate for 2000 from 4.7% to 4.1%. An additional change in the methodology bumps the rate back up by 2/10 to 3/10, which puts the final growth rate at about 4.3%.

Ontario's Economic Growth



- Ontario's Real Growth in 2000 - 5.5%.

- CPI Inflation rate 2000 - 2.9%.

- Ontario accounts for around 38% of Canada's population and an even larger share of its gross domestic product at 42%.

- 93% of Ontario's exports go to the U.S. - the highest share in Canada.

The province has experienced economic growth well above the national average in the past few years and the trend will continue. This makes Ontario a key contributor to the country's economic performance, with 41.2% of Canada's Nominal GDP. **(Using the current prices to value current production is known as nominal GDP)**

- Personal income per capita in Ontario in 2000 was $28,977 compared to $26,768 for Canada.

Ontario and National Economic Activity, 2000

Indicator	Ontario's Growth	Canada's Growth
Gross Domestic Product	5.3%	5.0%
New Jobs Created	3.2%	2.7%
International Exports	8.0%	5.3%
Investment Intentions	7.5%	5.3%
Manufacturing Shipments	8.2%	10.7%

Source: Statistics Canada

ECONOMIC DEVELOPMENT AND COLLEGES

- Colleges are essential to success of new-knowledge based economy.
- Colleges offer skills shortages relief, for new job categories requiring unique skills sets, but drives up the knowledge "intensity" of existing occupations.
- Human Resources Development Canada forecasts that *some* postsecondary education will be required for 72% or 1.3 million new jobs created between 1999 and 2004.
- Colleges supply contract and customized training to business partners.

✳ *See more about Ontario's economic regions on ACAATO's website:*
http://www.acaato.on.ca/new/research/scan/2002/webonly/

"Challenges for postsecondary education in the 21st Century provide an immediate opportunity for innovation, renewal and transformation. The projected double cohort of secondary students and the support of external bodies such as the Ontario Jobs and Investment Board (OJIB) are providing the impetus and the challenge. The rapidly changing marketplace, the explosion of the use of technology, shifting demographics, and the projected increase in the numbers of learners participating in postsecondary education provide the stimulus to explore creative and novel strategies to continue to provide access to quality education and training programs in the colleges and to continue to promote economic development."[26]

Sustainable Development – Along with other federal government departments, Industry Canada has a Sustainable Development Strategy, which commits the department to work in partnership with industry, consumers and other key stakeholders to advance sustainable development and contribute to a knowledge-based economy. The strategy's objectives are: foster a marketplace climate that promotes sustainable development; enhance the ability of Canadian firms to develop and use innovative technologies and tools that contribute to sustainable development; encourage trade and investment flows which contribute to sustainable development; and, continue to improve Industry Canada's capacity to manage and deliver policies, programs and operations which contribute to sustainable development.

Canadian Economic Observer, Summary Table. Key Indicators Overview, March /01

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[26] Investing in Ontario's Economic Development, Opportunities and Issues for Increasing Capacity in Colleges, ACAATO

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Emerging Trends

PARTNERSHIPS

"Increasing demand is leading to greater consolidation as companies and institutions join forces to open up new markets and provide more complete training solutions to both Canadian and international clients."[27]

Many businesses today are fuelling growth and strengthening customer relations by forming alliances. Brenda Chartrand, director of organizational effectiveness research with the Conference Board of Canada's Centre for Management Effectiveness, is quoted as saying that "strategic alliances can be a cost-effective, flexible way to promote growth, penetrate new markets and offer new products and services." The report, *Partner or Perish? The Case for Strategic Alliances*, presents the findings of the board's first executive study tour on strategic alliances.[28]

- The gap in Canada-U.S. living standards is large and widening. Productivity explains 85% of the income gap.
- To close the gap requires closing the innovation gap; the investment gap; attracting and retaining foreign direct investment; ensuring a flexible and dynamic industrial structure, and developing corporate strategies geared toward improving productivity.
- The ultimate benefit of higher productivity is higher standard of living and broader range of private and social choices.[29]

TECHNOLOGY AND THE ECONOMY – from the "Survey of Electronic Commerce and Technology, 2000."

- The total value of private sector sales over the Internet, with or without on-line payment, rose dramatically in 2000, while the proportion of businesses selling on-line fell.
- Canadian businesses received $7.2 billion in customer orders over the Internet in 2000, up 73.4% from $4.2 billion in 1999. However, only 6% of businesses reported selling goods and services on-line in 2000, down from 10% in 1999.
- Despite the substantial advance, e-commerce sales still accounted for only 0.4% of total operating revenue in 2000, up slightly from 0.2% in 1999.
- Internet sales represented 2.6% of total operating revenue in private sector educational service industries, the highest share, followed by 1.5% for transportation and warehousing.
- Overall, 20% of sales over the Internet were to consumers as opposed to business. Consumers accounted for 88% of Internet purchases in the arts, entertainment and recreation sector, and 73% in the accommodation and food services sector, the highest proportions. However, consumers accounted for only 49% of Internet sales from retail enterprises.
- 17% of e-commerce sales were to customers (businesses or households) outside Canada. This varied widely across industries - more than one-half of all e-commerce sales were in

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[27] Canadian Alliance of Education and Training Organizations, Industry Canada, April 2001

[28] Financial Post, Working World, March 15, 2001, pg. C6

[29] Canada in North America, Economic Opportunities and Challenges, Industry Canada, CABE Policy Conference, March 30, 2001

professional and technical services, arts, entertainment and recreation, and accommodation and food services.

- In contrast, only 3.2% of Internet sales by retailers went outside Canada.
- Measured by value, e-commerce sales were highest in manufacturing, followed by wholesale trade, transportation and warehousing, and retail trade.
- Manufacturers sold $1.3 billion worth of goods and services over the Internet, 0.2% of their operating revenue. Most of the e-commerce sales in this industry came from transportation equipment manufacturers. Only 3% of manufacturers' sales were to consumers, while 23% of their on-line sales went outside Canada.
- While the proportion of businesses selling on-line was lower in 2000, the percentage of Canadian businesses purchasing goods or services over the Internet was higher. 18% of firms bought goods or services over the Internet, up from 14% in 1999.
- While the value of sales over the Internet was small, businesses eagerly embraced the Internet in 2000; 63% of them used the Internet, up from 53% in 1999. Thirty-nine percent of private sector employees had Internet access in 2000.
- The proportion of businesses using the Internet advanced in almost all industry sectors. Internet use was most common in information and cultural industries (93%), private sector educational services (89%) and professional and technical services (84%). Forestry, logging and support activities had the lowest Internet penetration rate, 42%.
- 60% of private sector enterprises had e-mail.
- The Internet and other similar networks continued to play an important role in communications.
- In 2000. 60% of private sector enterprises had e-mail, compared with 53% in 1999. All industry sectors recorded an increase in the percentage of enterprises with e-mail except utilities, where 83% of enterprises had e-mail in 2000.
- Besides e-mail, 12% of enterprises had an intranet, an internal company communications network using the same protocol as the Internet, enabling communication within an organization.
- In addition, a higher proportion of enterprises had a Web site in 2000: 25% of enterprises had a Web site, up from 22% in 1999. Private sector enterprises in the educational services industry were most likely to have a Web site (70%). More than one-half of the enterprises in information and cultural industries had a Web site.

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LABOUR

Section Four

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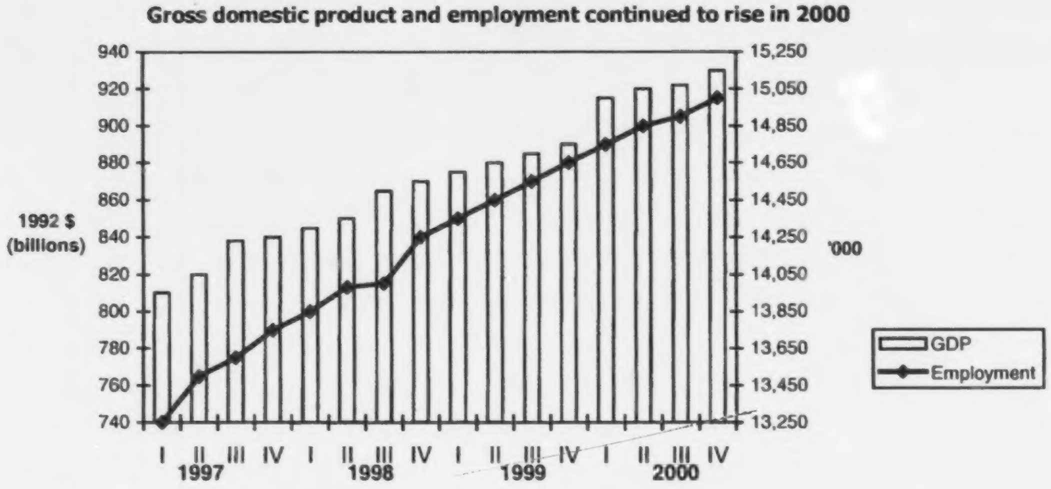
It is apparent from all available data that the majority of Ontario's college learners are headed into the workforce. Some students are entering the labour force for the first time while others are undergoing a career change. To responsibly provide the opportunities and direction of applied education, it is vital that we align ourselves with the requirements of industry and trade and understand local, national and global trends. This section provides a look at the current labour market, the labour force and graduate employment profiles.

Canada's Labour Force



Source: Labour Force Survey and System of National Accounts, seasonally adjusted (yearly quarters)

HIGHLIGHTS – THE 2000 LABOUR MARKET YEAR-END REVIEW,[30]

- Employment rose by 319,000 jobs in 2000; 263,000 were full-time and 56,000 were part-time. This equates to growth of 2.2% and 2.1% from 1999 respectively.
- Manufacturing employment ended 2000 up by 60,000 or 3%.
- Self-employment declined by 6% for the first year since 1986 with 146,000 fewer individuals working for themselves in 2000. Approximately one-third of this reduction was due to reduced farm employment.
- There was an increase in private sector employment, with a jump or 4% or 376,000.
- Public sector employment increased by 89,000. Public administration and education declined, while health care and social assistance realized the bulk of the increase.

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[30] Statistics Canada. Catalogue 75-001-X1E Perspectives on Labour and Income, January 2001

- In 2000, employment in sales and service rose by 3%, or 124,000 workers. This number was driven by the increased hiring at retail and wholesale outlets; however there were fewer retail/wholesale store managers hired.
- Employment among women between the core working ages of 25 – 54 increased by 115,000 or roughly 2%.

Canada's Employment by Industry

	December 2000	Change from December 1999	
	'000	'000	%
Goods Sector	**3,891.8**	**26.5**	**0.7**
Agriculture	347.5	-51.6	-12.9
Forestry, fishing, mining, oil and gas	277.7	2.4	0.9
Utilities	117.7	2.3	2.0
Construction	820.6	13.2	1.6
Manufacturing	2,328.4	60.2	2.7
Service Sector	**11,174.9**	**292.7**	**2.7**
Trade	2,354.4	82.7	3.6
Transportation and warehousing	787.8	23.6	3.1
Finance, insurance, real estate and leasing	881.9	16.6	1.9
Professional, scientific and technical	988.6	62.1	6.7
Management, administrative and other support	559.2	41.7	8.1
Education	952.1	-49.6	-5.0
Health care and social assistance	1,523.7	51.8	3.5
Information, culture and recreation	700.6	64.4	10.1
Accommodation and food	965.7	15.1	1.6
Other	698.4	-10.5	-1.5
Public administration	762.4	-5.4	-0.7
Total	**15,006.7**	**319.2**	**2.2**

Source: Labour Force Survey, Seasonally adjusted – Statistics Canada (Historical Labour Force Statistics 2000, pg. XXIII)

Source: Labour Force Survey, Seasonally Adjusted, Labour Market Year-End Review, Perspectives on Labour and Income, Statistics Canada, January 2001, Vol. 2 No. 1

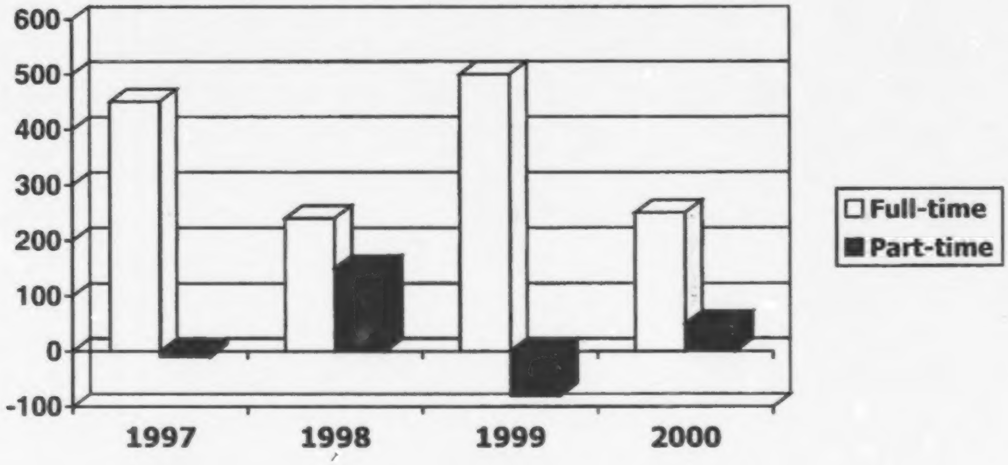
Slower economic growth in the goods sector was reflected in the labour market:

- For every additional goods-producing job, 10 service jobs appeared.
- Sales and computer-related jobs were more plentiful in 2000 than in 1999.
- Youths and core-age women (25-54), who are more likely to work in the service sector, gained over three-quarters of the jobs.
- Employment grew equally in professional, scientific and technical services, and information, culture and recreation.
- Smaller increases appeared in health care and social assistance, and management, administrative and other support services.
- The largest increase was in retail and wholesale trade.
- At the end of 2000, 250,000 people worked in the computer systems design industry (up 20,000 or 9% from 1999). Employment in this industry has tripled since 1994.
- Information, culture and recreation were up 64,000 or 10%.
- Business support services were affected by the growing trend to outsourcing, and may indicate that firms are relying on other companies for human

resources service needs. By the end of 2000, 85,000 workers were in this industry, more than double the level of1994.

- Trade employment rose 3.6% (83,000) reaching over 2.3 million workers at the end of 2000.

Part-time employment increased in 2000



Source: Statistics Canada - Labour Force Survey, seasonally adjusted December levels

UNEMPLOYMENT

- Unemployment in Canada was 6.8% throughout most of 2000, influenced by rising labour market participation.
- The adult rate was 5.7% in 2000, up from 5.6% at end of 1999.
- Youth unemployment rate was 12.6% in November, down 0.5% points over the same period (end 1999).

PROVINICIAL UNEMPLOYEMENT RATES

- Manitoba and Alberta were lowest at 4.9%.
- Rates are down year-to-year in Nova Scotia, Manitoba, Saskatchewan, Alberta, and British Columbia.
- The sharpest rise was in Newfoundland where the rate was up 3.5% as of November 2000 due to job losses compounded by labour force growth. (Growth in the participation rate affects the unemployment rate).
- Ontario showed strong job gains but higher labour growth meant an unemployment rate of greater than 6%.

Canada's Labour Force Trends[31]

	March '00	March '01	% change
	'000s		
Employment	14,843	15,073	1.6
Unemployment	1,085	1,143	1.5
Labour Force	15,928	16,216	1.8
Participation Rate	66	66	1.8
Employment Rate	61	62	-

CANADA's LABOUR MARKET TRENDS

New Job Creation Projections 1999 – 2004

Economic growth is expected to account for 40% of new job openings over the next five years. About 80% of these new job openings are expected to be in the service sector of the economy, primarily in the business services, health, accommodation and food services, and personal services industries.

- Growth in the business services industry is due to increased demand for computer professionals and consultants.
- The health sector is expected to increase proportionately to the aging population and reflect the restructuring of private practices and medical labs.
- The accommodation and food services industry is expected to have strong employment growth.
- The personal services industry is expected to have a rate of new job creation that is twice that of the economy-wide average for all industries.
- The public administration sector is expected to grow, though staying below earlier peaks.
- Employment growth in the education sector is expected to rebound slightly in some provinces, although growth will stay below average.
- The communication sector overall is expected to shed workers over the projection period, especially in the radio and television industry.

The remaining 20% of new job creation will be in the goods sector of the economy, mainly in construction and manufacturing industries.

- The construction industry is expected to continue its recent strong employment growth. Job opportunities are expected to increase due to residential and commercial construction and replacement of ageing infrastructures, such as bridges and roads.
- The manufacturing sector as a whole is expected to grow slightly slower than average, with strong growth in specific areas, such as rubber, plastics, paper products, printing and publishing, and machining industries.
- Agriculture and mining sectors are expected to remain weak, due to mechanization, weak world commodity prices and labour-saving devices.
- Employment losses in Forestry and fishing over the period are expected for the general worker, however highly-skilled, highly specialized, jobs will be available.

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[31] Adapted from Economy in Brief, March 2001, Department of Finance Canada

Emerging Sectors and Occupations

Emerging occupations are those that require knowledge and abilities, which are not defined by occupations in current occupational coding structures.[32] The Human Resources Development Canada document, *World of Work: Overview and Trends*, [33] cites the 'unprecedented rate and breadth of technological advances and the impacts of global competition on the pace of developing and adopting new technologies' as key effects on Canadian labour markets. They define emerging sectors and occupations as being: 1) completely new; 2) undergoing significant change; or 3) experiencing high employment growth.

Four major components make up the new and growing information technologies and telecommunications sector. Each component has burgeoning occupations:
- software and computer services;
- manufacturing;
- communications and cable services; and
- multimedia.

For example: multimedia applications have a wide variety of purposes – information, education, medical diagnosis and treatment, and entertainment. Multimedia is one of the new knowledge-based industries paving the way for the creation of several thousand jobs in Canada and for Canadian trade development in a globalized economy. It will transform all of the economic and social activity sectors, specifically education and training, entertainment, trade and communications.
The increasing popularity and subsequent use of multimedia has created many new occupations. For example: webmasters, multimedia product testers, 3D animators, content analyst, integrator, and designer-writer.

Technology has radically affected existing occupations – in addition to introducing new occupations, the multimedia sector includes hybrids of more traditional occupations, such as: cyberjournalists and cybercafé managers.

Occupations in other sectors are also undergoing significant changes due to technological advances. **Sectors experiencing growth results in high employment growth, for example:**

- Information Technology and Telecommunications – there is strong recruitment for computer managers who are responsible for an organization's computer network;
- Biotechnology – the occupations most in demand require a blend of technical and management skills, particularly senior personnel with combined science and business backgrounds;
- Aerospace Industry – aerospace engineer and aviation mechanic.

Areas affected by new legislation result in new or emerging occupations, for example:

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[32] Employment Trends, Ontario job futures 2000, Retrieved from: http://jobfutures.ca/doc/jf/emerging

[33] Retrieved from: http://www11.hrdc-drhc.gc.ca/doc/jf/emerging/emerging.shtml

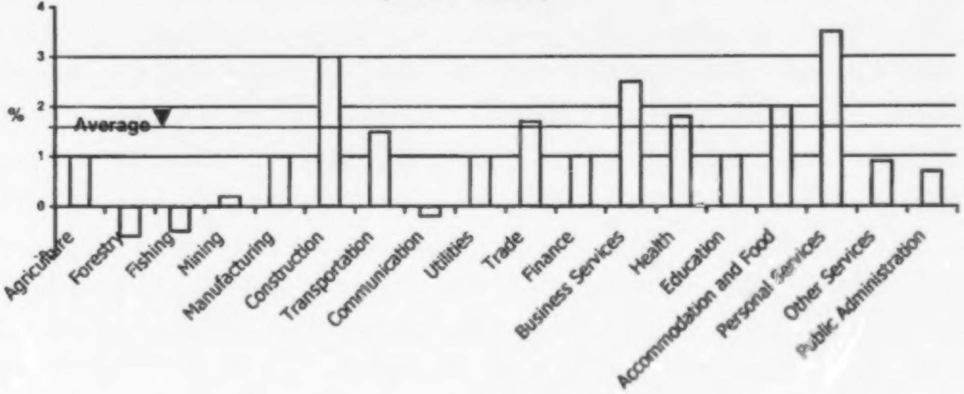
- Patent and international trade law – patent agents and specialists in international trade law.
- Environment – a commitment to sustainable development as resulted in many new or hybrid occupations such as environmental technologist, environmental lawyer, and environmental policy analyst.
- Legalization of gambling in some areas has created positions for Gaming Supervisors
- Tele-health and Tele-learning

THE LABOUR FORCE SURVEY

The Labour Force Survey (LFS) has undergone extensive revisions to reflect two important changes to the way in which labour market data are produced. As a result, all LFS estimates have been revised back to January 1976.

✳ *For more information on these revisions go to "Improvements in 2000 to the LFS" on Statistics Canada's website:* http://statcan.ca

Canada's Growth in Employment Requirements by Industry (1999 - 2004)



Source: COPS 1999 Macroeconomic Reference Scenario, T-99-IE, Retrieved from Human Resources Development Canada's website, March 2001.

✳ To view *Profit Guide's* Top Ten Fastest Growing Companies – Canada 2000, visit the ACAATO website at http://www.acaato.on.ca/new/research/scan/2002/webonly/

YOUTH EMPLOYMENT

- The recent decline in youth participation appears to be a result of a combination of factors, including: increased school attendance; depressed job opportunities; and a downward shift in the age composition of the youth group.
- As skilled workers will be increasingly in demand, youths will tend to remain in school longer.
- As of March 2001, youth employment (ages 15-24) was up 2.6% compared to the same period in the previous year.

- The Hilary M. Weston Foundation for Youth announced "First Connection," an Ontario-wide summer business internship and $3,000 bursary for grade 12 students, to provide students with the training and skill to help them better prepare for their careers.[34]

An estimated 60% of new jobs are due to normal attrition from the workplace. However, over the next few years "Boomers" will begin retiring and there simply will not be enough youth to fill the vacancies.

LABOUR AND RETIREMENT

- Over the next 50 years, growth in the ratio of retirees to workers will put unprecedented stress on social security programs.
- If the current age-sex participation rates hold, the overall participation rate could fall from 65% in 2000 to about 63% in 2010, and to below 60% in 2020.
- The median age for retirement among men has fallen from 65 in the late 1970s and 1980s to 61.3 in 1997.
- Factors affecting the age of retirement in the future are: the extent of self-employment (the self-employed tend to retire later), the availability of flexible transitions to retirement (such as part-time work), and the extent to which older workers are covered by pension plans.
- *Retirements are expected to play a relatively large role in new job openings in the education, finance, and public administration industries.*
- While the **education** industry is expected to have a below-average rate of new job creation, it is expected to have strong growth in job openings due to retirements. This is the result of the average age of workers in this industry. Compared to other sectors, there are relatively more workers in the 45 and older category in the education sector and the average retirement age is below the all sector average.

✳ *For a Profile of the Workforce by Industry – Average Age of Retirement, visit the ACAATO website at:*
http://www.acaato.on.ca/new/research/scan/2002/webonly/

EMPLOYMENT PROSPECTS FOR AGING WORKERS

"Employers will be looking to a wider range of folks – and not just kids anymore. Talent shortages are a part of it, but so is the fact that workers in general have greater access to the continuing education they need in order to be employable. New technologies have meant more workplace education has had to happen and learning institutes have contributed with distance education programs. As people develop these new skills, they often change careers and they move into something completely unanticipated."[35]

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[34] http://www.first-connection.org/eng/fc2001.html

[35] Arlene Wortsman, Director of Labour at the Canadian Labour and Business Centre in Ottawa, quoted in National Post Business, December, 2000.

Demographic projections suggest that discrimination against "experienced workers" will break down over the next decade or so. There are some 9.8 million Canadian baby boomers, about a third of the country's population, observes David Foot in *Boom, Bust and Echo* (Macfarlane, Walter & Ross). By 2011, nearly 40 per cent of all Canadian workers will be between 45 and 65.

"The same companies and organizations that now discriminate against older people are going to go looking for them. There will come a time when older people who still have their health, who have expertise, will be revered in this country, will be sought after. Toronto Star, May 5, 2001 – Careers Section H9

Ontario's Labour Force

(**Note:** labour figures may vary depending on source.)

EMPLOYMENT HIGHLIGHTS

- Ontario accounts for almost 40% of Canada's employment and 60% of Canada's overall employment increase.
- Employment rose by 186,000 over 2000, an increase of 3.2%.
- The strong job increase was enough to raise Ontario's employment rate 0.8 percentage points, however,
- A surge in labour force participation actually led to an increase in the unemployment rate. At the end of 2000, the rate was half a percentage point higher than 1999, at 6%.
- The gain in manufacturing (up by 7%) in Ontario contributed strongly to employment growth in Toronto, Ottawa, Windsor, St. Catherines-Niagara, Kitchener-Waterloo and London.
- Almost 6 in 10 newly employed people lived in Ontario.
- ***The proportion of workers in Ontario with postsecondary qualifications increased in all occupational groups between 1990 and 1999.***

"Projections to the year 2005 indicate that the main source of new job creation will to be to the service industries. Taken together, the transportation and communications, wholesale and retail trade; finance, insurance and real estate; community, business personal services and public administration sectors will account for about three-quarters of the projected new jobs in the economy. The manufacturing and construction sectors are projected to contribute 16 and 8 percent respectively to new job creation. Primary resource industries will make a very modest contribution to projected job creation." [36]

Recent Trends

- Ontario's employment grew by 16,000 on a seasonally adjusted basis in Jan. 2001.

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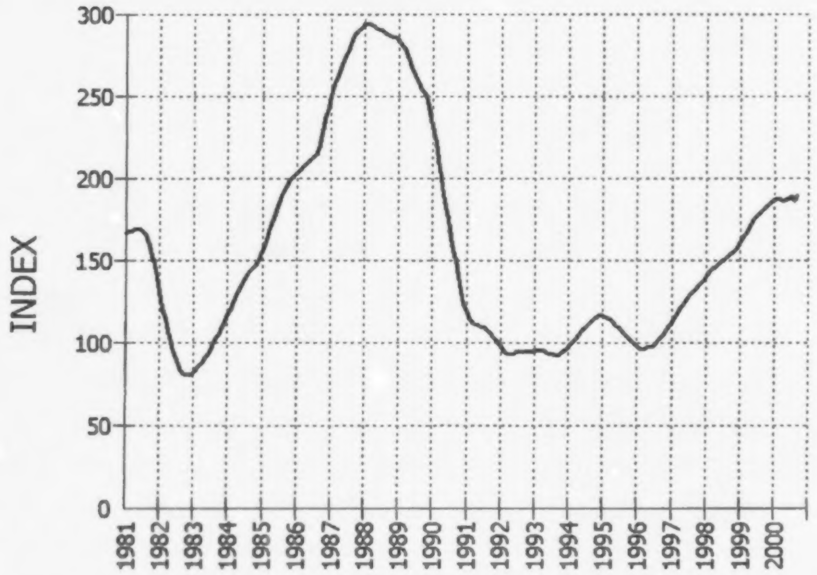
[36] http://www.ont.hrdc-drhc.gc.ca/english/lmi/eaid/ojf/overview_e.html

HELP-WANTED INDEX, REGION - HWI ONTARIO PROVINCE, MONTHLY, SEASONNALY ADJUSTED



- 6,338,000 people had jobs in the labour force (down 5,000 from Dec. 2000).
- Combination of job growth and labour force decline pushed the unemployment rate down by 0.3% points in Jan. 2001. At 5.7%, the jobless rate for Ontario was much lower than the Atlantic provinces, but slightly higher than the prairie provinces.
- Employment prospects for youth also improved in Jan. 2001, as the jobless rate for the 15-24 year-olds declined by 1.6% points to 10.9%.

The Help-wanted Index is released monthly by Statistics Canada. It is compiled from the number of help-wanted advertisements published in 22 newspapers in 20 major metropolitan areas.

The index is a measure of companies' intentions to hire new workers. The indices have been seasonally adjusted and smoothed to ease month-to-month comparisons.

ONTARIO LABOUR MARKET 2000 YEAR-END REVIEW

- 184,000 jobs created in 2000 (of which 14%, or 26,000, were part-time)
- The last three years of the 1990s registered growth in excess of 3%
- Full-time employment growth: 3.4%
- Part-time employment growth: 2.6%
- The labour force grew by 157,000 in 2000 to an average of 6,228,000, which meant a growth rate of 2.6 percent. Much of this growth was due to a surge in the participation rate, which gained one-half of a percentage point to reach 67.1

percent. Of the 184,000 jobs created in the Ontario labour market in 2000, 30% (or 51,000) were created in the goods-producing sector and 70% (or 133,000) were created in the services-producing sector.

- Manufacturing employment jumped 78,000.
- The professional and technical occupational group (excluding teaching and health care) are expected to make up 24% of new jobs between 2000 and 2005.

HOT JOBS IN 2000

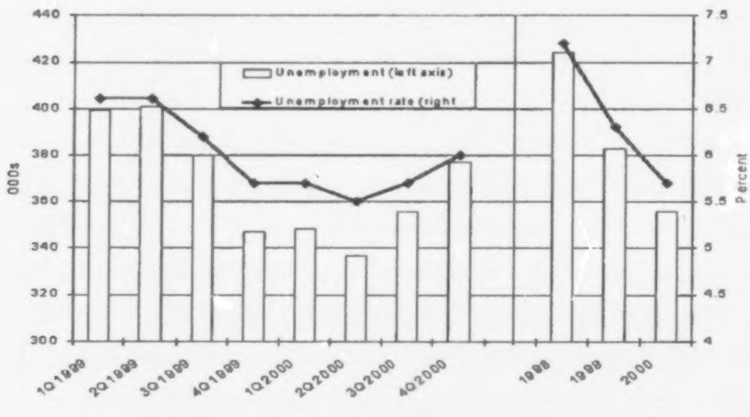
In order of ranking, beginning with number one, the technical hot jobs included: e-commerce developers, application development architects, database architects, RF engineers, and data mining. The non-technical hot jobs included: sales and marketing, business development, human resources, merger and acquisition specialists, and materials management. The technical hot skills for 2000 included internet/e-commerce, Java/Javascript, network development, Oracle/D/B administration, C/C++ programming, and SAP/PeopleSoft. The non-technical skills included: project management, communications skills, teamwork, leadership, customer focus, and business acumen.[37]

Labour Force Estimates – Ontario – Selected Years – Annual Average

	1990	**1995**	**2000**
15-24 years	1,487,300	1,454,900	1,516,400
25 years and over	6,473,900	7,108,100	7,758,000
25-44 years	3,417,800	3,590,500	3,718,700
45 years and over	3,056,1 00	3,517,500	4,039,300

Source: Historical Labour Force Survey 2000, Statistics Canada

Ontario Unemployment, Seasonally Adjusted



Source: Ontario Labour Market Bulletin, Human Resources Development Canada, 2000

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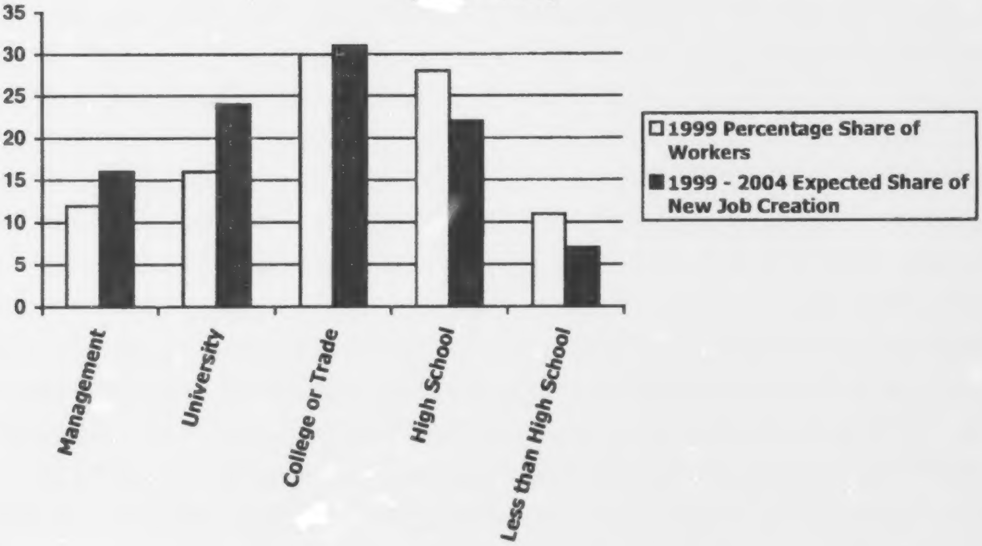
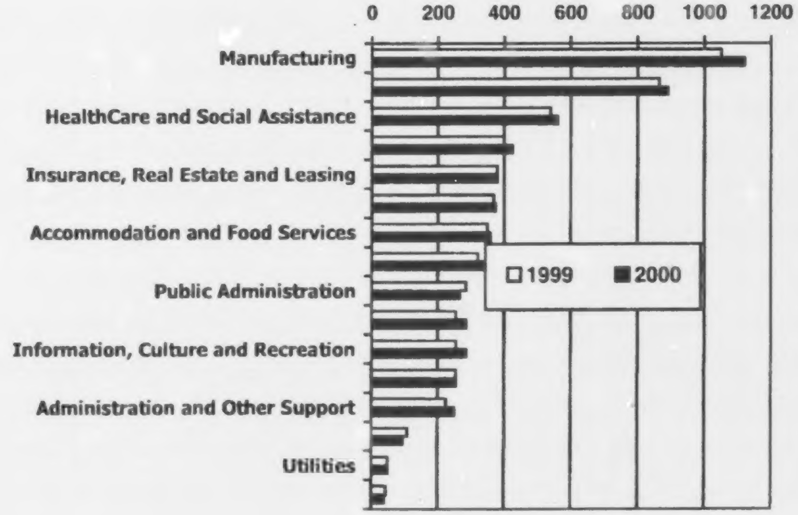
[37] Canadian HR Reporter, November 6, 2000, pg. 3

Share of New Job Creation by Skill Level (1999 - 2004)



Source: 1998 Labour Force Survey and the COPS Demand Model (1999). Retrieved from: Human Resources Development Canada website: - Trends, March 2001

Ontario Employment by Industry



Source: Ontario Labour Market Bulletin, Human Resource Development Canada, 2000

Summary of Labour Force Statistics – Ontario

	1999	2000	Absolute	Percentage
			Change	
Labour Force				
Men	3,259,000	3,330,000	71	2.2
Women	2,811,000	2,898,000	86	3.1
15-24	972,000	1,002,000	30	3.0
25+	5,099,000	5,226,000	128	2.5
Unemployment				
Men	202,000	184,000	-18	8.7
Women	181,000	172,000	-9	-5.2
15-24	128,000	118,000	-10	-7.5
25+	255,000	238,000	-17	-6.8
Unemployment Rate				
Men	6.2	5.5	-0.7	
Women	6.4	5.9	-0.5	
15-24	13.1	11.8	-1.3	
25+	5.0	4.6	-0.4	
Participation Rate				
Men	73.2	73.4	0.2	
Women	60.4	61.2	0.8	
15-24	65.0	66.1	1.1	
25+	66.9	67.4	0.5	

Metro Area Unemployment Rate (annual)	**1999**	**2000**	**Absolute Change**
Ottawa	6.3	5.4	-0.9
Sudbury	9.8	8.1	-1.7
Oshawa	5.9	5.7	-0.2
Toronto	6.1	5.5	-0.6
Hamilton	4.9	5.0	0.1
St. Catherines-Niagara	6.9	6.0	-0.9
London	6.7	6.0	-0.7
Windsor	6.5	5.4	-1.1
Kitchener	5.7	5.6	-0.1
Thunder Bay	7.8	6.3	-1.5

Source: Human Resources Development Canada, Summary of Labour Force Statistics – Ontario, 2000

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Labour and Education:

Labour Market Outcomes for College Graduates - Projections 1999 – 2004

- The outlook for Canadian community college graduates is generally expected to remain fair over the projection period. This reflects the balance between a limited outlook for graduates from natural science and primary industry technologies, largely due to weaknesses in the primary industries where they normally look for work, and good outlook for those looking for work in the medicine, health and computer science fields. The positive outlook for these latter two fields follows largely from the demands of an aging population, the infusion of new spending in the health sector, and the global trend towards a knowledge-based economy.
- Limited for education/counselling graduates as above-average new job creation is exceeded by growth in the number of new graduates
- A decline in growth is expected for retail sales grads due to below-average growth in new job creation combined with growth in the number of school leavers and occupational re-entrants.
- A decline in growth is expected for electrical/electronic technology and instrumentation technology graduates as average new job creation is exceeded by growth in the number of new graduates[38]

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[38] Human Resources Development Canada,

Labour Market Conditions for Recent Postsecondary Graduates
Current and 2004 Overview of Labour Market Trends

Education Level

Broad Field of Study	Master's	Undergraduate	Community College	Trade/ Vocational	All
	Current - 2004	Current - 2004	Current - 2004	Current - 2004	Current - 2004
Arts	--	fair-fair	fair-fair	fair-fair	fair-fair
Business, Commerce, Management & Administration	good-good	good-good	fair-fair	limited-limited	good-good
Education	fair-fair	fair-fair	fair-limited	--	fair-fair
Engineering & Engineering Technologies	good-good	good-good	fair-fair	fair-fair	fair-fair
Humanities	fair-fair	fair-fair	fair-fair	--	fair-fair
Natural Sciences and Primary Technologies	fair-fair	fair-fair	limited-limited	limited-limited	fair-fair
Medicine and Health	good-good	good-good	good-good	fair-fair	good-good
Physical Sciences	good-good	good-good	good-good	good-good	good-good
Social Sciences and Services	fair-fair	fair-fair	fair-fair	limited-limited	fair-fair
All	good-good	fair-fair	fair-fair	fair-fair	fair-fair

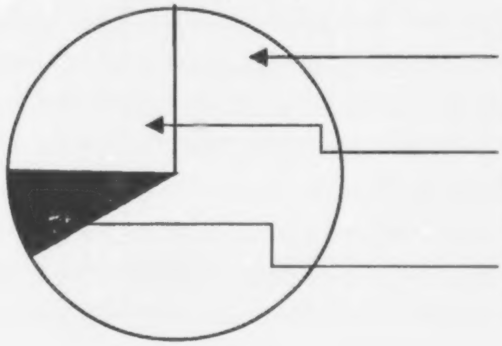
Labour Market Conditions for Recent Postsecondary Graduates
Current and 2004 Overview of Labour Market Trends

Skill Level

Skill Type	Managerial	Professional	Technical, Paraprofessional & Skilled	Intermediate	Labouring and Elemental	All
	Current - 2004	Current - 2004	Current - 2004	Current - 2004	Current - 2004	Current - 2004
Business, Finance & Administration	good - good	good - good	good - good	fair - fair	--	good - good
Natural & Applied Sciences	good - good	good - good	good - good	--	--	good - good
Health	good - good	good - good	fair - fair	fair - fair	--	good - good
Social Science, Education, Government Services & Religion	good - good	fair - fair	fair - fair	--	--	fair - fair
Art, Culture, Recreation & Sport	good - good	fair - fair	fair - fair	--	--	fair - fair
Sales & Services	good - good	--	fair - good	fair - limited	limited - limited	fair - limited
Trades, Transport & Equipment Operators	fair - good	--	fair - fair	fair - fair	limited - limited	fair - fair
Primary Industry	good - fair	--	fair - fair	limited - limited	limited - limited	fair - fair
Processing, Manufacturing, & Utilities	good - good	--	good - good	fair - fair	limited - limited	fair - fair
All	good - good	good - good	fair - fair	fair - fair	limited - limited	fair - fair

Source: Human Resources Development Canada

Relationship Between Job and Program of Study



65.4% of graduates employed indicated that they were **employed in a job related** to their program of study.

24.4% of graduates employed indicated that they were **employed in a job that was not related** to their program of study.

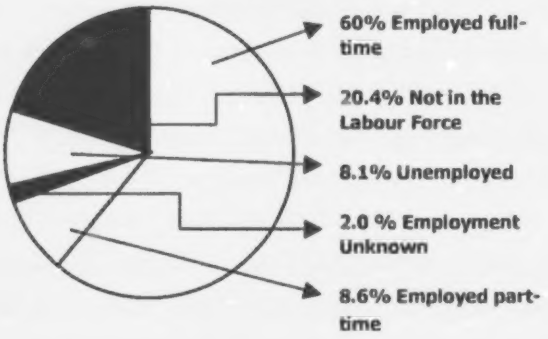
10.2% of graduates employed indicated that they were **employed in a job partially related** to their program of study

Source: Ministry of Training Colleges and Universities, Employment Profile, A Summary of Employment Experiences of 1998 – 1999 College Graduates, 6 months after graduation.

STUDENT RECRUITING IS RECESSION PROOF:

- According to the *Canadian HR Reporter, Guide to Recruitment and Staffing*, February 26, 2001, a combination of demographics, technology and economics make student recruiting recession-proof. The need for skilled labour ensures that despite the current economic slowdown and the slow down in GDP growth, companies will be actively seeking university and college graduates.
- Government agencies, public utilities, health-care organizations, oil and gas

Status of Graduates 1998 - 1999

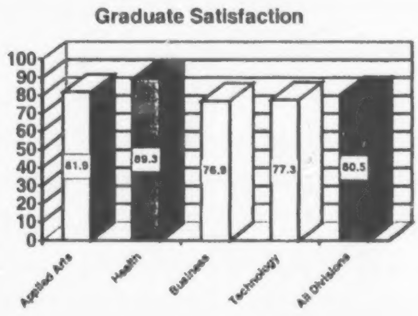


companies and the education sector are facing a significant percentage of retirees in the next five years. Companies are aggressively recruiting graduating students now so that they will be ready to fill management positions in the future.

- As the trend in business to reduce costs and improve efficiencies by introducing new technologies continue, students graduating with technical skills are finding plenty of job opportunities.
- Companies that recruit on university and college campuses build a relationship with specific schools over time. Not unlike product branding, college recruiters are seeking to maintain top-of-mind awareness with students.

Employed Full-time: Graduates who worked at one job at least 30 hours per week, or less than 30 hours per week if this is considered full-time employment in a particular occupational field.
Not in the Labour Force: Graduates who were not employed and were not looking for work, including those attending school full-time, travelling or staying home for health reasons or because of family responsibilities.
Unemployed: Graduates who were not employed but were looking for work.
Employment Unknown: Graduates who did not indicate their employed status as full or part-time.
Employed Part-time: Graduates who worked at one job less than 30 hours per week.

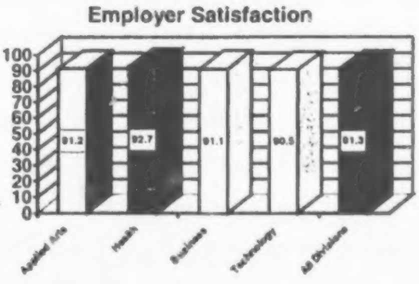
PROVINCIAL OVERVIEW OF STUDY RESULTS:



Graduate Satisfaction:
The percentage of graduates that competed the survey, who are very satisfied/satisfied with the usefulness of their college education in achieving their goals after graduation.

Employer Satisfaction:
The percentage of employers that completed the survey who are very satisfied/satisfied with employee educational preparation for the type of work he/she was doing.

Source: Ministry of Training Colleges and Universities, Employment Profile, A Summary of Employment Experiences of 1998 – 1999 College Graduates, 6 months after graduation.



For information on Skills Shortages go to www.acaato.on.ca/new/research/news/2001/mar01.pdf

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The Conference Board of Canada developed the employability profile of critical skills required in the workforce. The foundation skills they cite are as follows:

- Academic
- Personal management skills
- Teamwork skills

✳ *For more information about the employability profile - visit the website:* http://conferenceboard.ca/nbec/ESF.htm

✳ Tom Peters, author of *In Search of Excellence*, is forecasting a 'white-collar revolution' for the near future read more about it on the ACAATO website at www.acaato.on.ca/new/research/scan/2002/webonly/.

A New Study of 1,000 respondents coast-to-coast and across a variety of industries Finds Many Canadian White-Collar Workers Tied to Job Around the Clock , [39]

- 81% accept business calls at home after regular business hours;
- 65% check their e-mail after hours;
- 59% check their voice-mail after hours;
- 30% accept faxes at home;
- 29% keep their cell phone on.

Impact of Innovation on Employment and Skill Requirements

Innovation affects labour in two ways:

- First, introducing new or improved production processes increases productivity. The technical change it introduces is likely to reduce unit labour requirements, which tends to reduce the demand for labour
- On the other hand, a successful launching of a new or improved product may increase sales and lead to increased demand for employment
- Technological change has been shifting the structure of employment by increasing the share of non-production workers in total employment (Baldwin and Rafiquzzaman, 1999), and innovation is one of the causes for the change
- The probability that a firm performs R&D is higher for firms under foreign ownership. Multinational firms not only exploit their proprietary advantages in Canada, but they also increasingly develop their own innovation initiatives and tap local sources of technology and scientific research.

✳ For a public opinion poll, "Canadians Remain Upbeat . . ." by Ipsos-Reid, visit the ACAATO website.

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[39] Ipsos-Reid Media Centre. Public Release Date: March 27, 2001

Appendix 4.1 - Graduates Employment Status by Division and Gender 1998-1999

Graduate Status	Applied Arts			Business			Health			Technology			Total		
	Female	Male	Total [a]	Female	Male	Total [a]	Female	Male	*Total* [a]	Female	Male	Total [a]	Female	Male	Total [b]
Total in the Survey	7,922	3,214	10,631	6,371	3,543	10,001	4,108	595	4,778	1,105	4,714	5,867	18,876	12,066	31,286
Total in the Labour Force	5,446	2,371	7,911	5,195	2,903	8,159	3,553	538	4,157	862	3,778	4,680	15,056	9,590	24,907
Participation Rate	74.6%	73.7%	74.4%	81.5%	81.9%	81.5%	86.4%	90.4%	87.0%	78.0%	80.1%	79.6%	79.7%	79.4%	79.6%
Employed	4,982	2,124	7,191	4,611	2,533	7,196	3,335	487	3,885	729	3,338	4,101	13,657	8,462	22,373
Employment Rate	91.4%	89.5%	90.8%	88.7%	87.2%	88.1%	93.8%	90.5%	93.4%	84.5%	88.3%	87.6%	90.7%	88.4%	89.8%
Full-time	3,988	1,889	5,944	4,078	2,318	6,437	2,369	385	2,797	673	3,172	3,875	11,108	7,764	19,053
Part-time	855	186	1,054	422	162	596	805	86	909	40	100	144	2,122	536	2,703
Unknown	139	49	193	111	51	163	161	16	179	16	66	82	427	182	617
Unemployed	464	247	720	584	370	963	218	51	272	133	440	579	1,399	1,108	2,534
Unemployment Rate	8.5%	10.4%	9.1%	11.2%	12.7%	11.8%	6.1%	9.4%	6.5%	15.4%	11.6%	12.3%	9.2%	11.5%	10.1%
Not in the Labour Force	1,846	843	2,720	1,176	640	1,842	555	57	621	243	936	1,196	3,820	2,476	6,379
Full-time Education	1,634	796	2,457	992	587	1,599	454	53	513	224	857	1,095	3,304	2,293	5,664
Other [c]	142	17	162	123	25	150	68	2	72	14	41	56	347	85	440
Unknown	70	30	101	61	28	93	33	2	36	5	38	45	169	98	275
Self-Employed Full-time	153	147	304	55	81	136	54	14	69	12	67	81	274	309	590
Self-Employed Rate	3.8%	7.8%	5.1%	1.3%	3.5%	2.1%	2.3%	3.6%	2.5%	1.8%	2.1%	2.1%	2.5%	4.0%	3.1%

a. Each division Total includes recorders with missing gender information
b. All divisions Total includes 344 records with missing gender information
c. Other Graduates' Status includes Travel, Health, and Family Responsibilities

Source: Ministry of Training Colleges and Universities, Employment Profile, A Summary of Employment Experiences of 1998 – 1999 College Graduates, 6 months after graduation.

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Appendix 4.2 - Annual Earnings of 1999 Graduates Employed Full-time in Jobs Related or Partially Related to Program of Study

Average Annual Salary Range	Applied Arts			Business			Health			Technology			Total		
	Female	Male	Total	Female	Male	Total	Female	Male	*Total*	Female	Male	Total	Female	Male	Total
Less that $10,000	1.7%	1.1%	1.5%	0.9%	0.6%	0.8%	0.7%	0.4%	0.7%	0.0%	0.4%	0.3%	1.1%	0.6%	0.9%
$10,000 - $19,000	26.9%	15.8%	23.6%	25.6%	14.1%	21.5%	20.9%	9.2%	19.4%	9.5%	8.7%	8.8%	23.9%	11.8%	19.0%
$20,000 - $29,000	47.7%	45.7%	47.1%	48.0%	35.5%	43.6%	37.1%	26.9%	35.8%	43.8%	37.2%	38.2%	45.0%	37.9%	42.1
$30,000 - $39,000	19.0%	27.7%	21.6%	20.7%	37.9%	26.9%	26.2%	35.7%	27.4%	36.3%	[illegible]	38.0%	22.4%	35.9%	27.8%
$40,000 - $49,000	3.4%	6.5%	4.3%	3.5%	9.3%	5.6%	10.2%	21.4%	11.6%	8.5%	11.8%	11.2%	5.4%	10.4%	7.4%
$50,000 and over	1.3%	3.2%	1.9%	1.2%	2.7%	1.7%	4.9%	6.3%	5.1%	2.0%	3.6%	3.4%	2.2%	3.4%	2.7%
Total Number	2,308	968	3,276	2,436	1,355	3,791	1,648	238	1,886	400	2,066	2,466	6,792	4,627	11,419
Average	$24,578	$27,722	$25,507	$24,943	$29,213	$26,469	$28,958	$33,957	$29,588	$29,270	$30,786	$30,540	$26,048	$29,847	$27,588
Median	$24,000	$26,593	$25,000	$24,000	$29,330	$25,029	$27,114	$33,525	$28,087	$28,698	$30,000	$30,000	$25,000	$29,500	$26,072

Source: Ministry of Training Colleges and Universities, Employment Profile, A Summary of Employment Experiences of 1998 – 1999 College Graduates, 6 months after graduation.

Private Vocational School Graduation and Employment Rates in Ontario, 1998/1999

- Six months after graduation 5,514 were employed
- Six months after graduation 6,927 were in the labour force (employed or looking for employment).
- Six months after graduation the employment rate was 79.6%
- In 1998/99 12,992 students graduated
- In 1998/99 19,394 were enrolled
- In 1998/99 the graduation rate was 67.0%

For individual vocational schools and program graduation rates visit the website: https://osap.gov.on.ca/eng/pdf/0001/pvsgrad.pdf

Appendix 4.3
Ministry of Training, Colleges and Universities, Employment Profile, Provincial Overview of Survey Results Industries of Employment (based on North American Industry Classification System)

Top Ten Industries – Applied Arts
(includes full-time and part-time employment)

Industry	Total Employed	Percentage of All Employed Graduates
Social Assistance	1,170	17.3
Professional, Scientific and Technical Services	642	9.5
Nursing and Residential Care Facilities	530	7.8
Educational Services	488	7.2
Administrative and Support Services	374	5.5
Amusement, Gambling and Recreational Industries	266	3.9
Food Services and Drinking Places	264	3.9
Broadcasting and Telecommunications	241	3.6
Food and Beverage Stores	156	2.3
Publishing Industries	147	2.2

Top Ten Industries – Business
(includes full-time and part-time employment)

Industry	Total Employed	Percentage of All Employed Graduates
Professional, Scientific and Technical Services	930	13.7
Food Services and Drinking Places	433	6.4
Administrative and Support Services	410	6.1
Credit Intermediation and Related Activities	391	5.8
Accommodation Services	285	4.2
Insurance Carriers and Related Activities	240	3.5
Food and Beverage Stores	188	2.8
Federal Government Public Administration	179	2.6
Educational Services	176	2.6
Computer and Electronic Product Manufacturing	174	2.6

Appendix 4.4

Ministry of Training, Colleges and Universities, Employment Profile, Provincial Overview of Survey Results
Industries of Employment (based on North American Industry Classification System)

Top Ten Industries – Health
(Includes full-time and part-time employment)

Industry	Total Employed	Percentage of All Employed Graduates
Hospitals	1,055	29.6
Ambulatory Health Care Services	1,028	28.9
Nursing and Residential Care Facilities	612	17.2
Social Assistance	137	3.8
Professional, Scientific and Technical Services	91	2.6
Personal and Laundry Services	80	2.2
Health and Personal Care Stores	76	2.1
Food and Drinking Places	65	1.8
Administrative and Support Services	43	1.2
Educational Services	38	1.1

Top Ten Industries - Technology
(includes full-time and part-time employment)

Industry	Total Employed	Percentage of All Employed Graduates
Professional, Scientific and Technical Services	606	15.6
Computer and Electronic Product Manufacturing	301	7.7
Transportation Equipment Manufacturing	283	7.3
Prime Contracting	189	4.8
Machinery Manufacturing	167	4.3
Fabricated Metal Product Manufacturing	159	4.1
Trade Contracting	145	3.7
Federal Government Public Administration	103	2.6
Administrative and Support Services	100	2.6
Broadcasting and Telecommunications	86	2.2

Appendix 4.5 - Labour Force, Employed and Unemployed, Numbers and Rates 2000

	Canada	Ontario
	(000s)	
Population, 15 years and over		
Both sexes	24,284.9	9,274.4
Men	11,927.8	4,536.6
Women	12,357.0	4,737.8
Employed		
Both sexes	14,909.7	5,872.1
Men	8,049.3	3,146.0
Women	6,860.4	2,726.1
Unemployed		
Both sexes	1,089.6	355.7
Men	600.0	184.1
Women	489.6	171.6
Not in the Labour Force		
Both sexes	8,285.7	3,046.5
Men	3,278.6	1,206.4
Women	5,007.0	1,840.1
Participation Rate - %		
Both sexes	65.9	67.2
Men	72.5	73.4
Women	59.5	61.2
Unemployment Rate - %		
Both sexes	6.8	5.7
Men	6.9	5.5
Women	6.7	5.9
Employment/population ratio		
Both sexes	61.2	63.3
Men	67.5	69.3
Women	55.5	57.5

Source: Statistics Canada, CANSIM, Matrices 3472 - 3482

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POPULATION

Section Five

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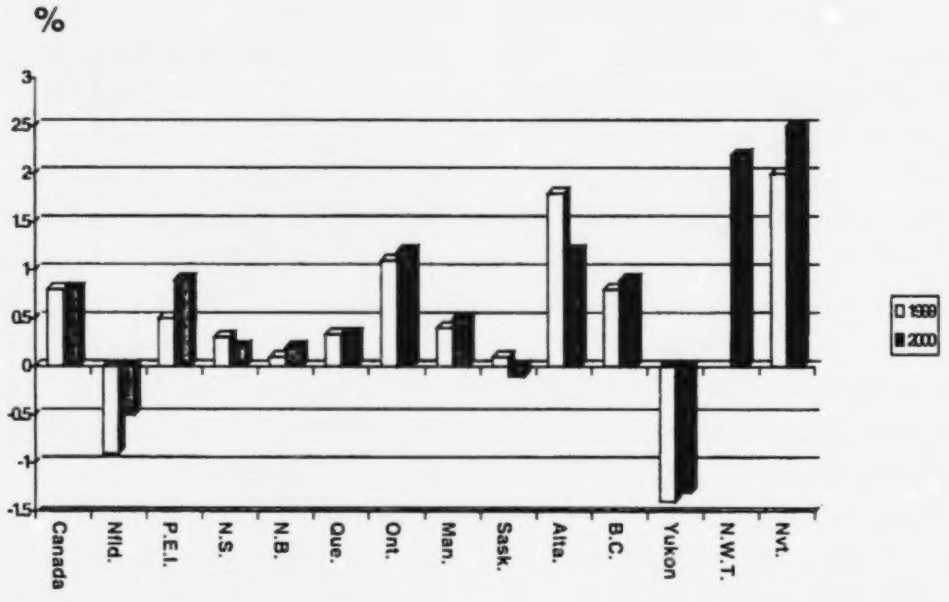
In his 1996 book *Boom, Bust and Echo,* David Foot theorizes that social changes and their resulting impact can be anticipated. According to Foot, "two-thirds" of everything can be explained by analyzing demographics. This section is an overview of population trends and demographic characteristics, which together help define the college market now and in the future.

Canada's Population Highlights

Canada's population on July 1, 2000, was estimated at 30,750,100, up 0.8% from July 1, 1999 when the number was estimated at 30,491,300. It is projected to reach 31.7 million by 2004, given certain conditions: that trends in natural increase continue; the immigration level meets targets; the number of emigrants increases slightly; and the number of non-permanent residents remains constant over the next five years.

Annual Population Growth Rate, Canada, Provinces and Territories, 1998-99 and 1999-2000



Source: Statistics Canada, Annual Demographic Statistics, 2000

Projected Population by Selected Age Groups and Sex, Ontario, July 1, 2001 to 2005

	2001	2002	2003	2004	2005
Males 10-14	410,217	418,332	425,890	429,767	431,070
Males 15-19	401,779	408,712	413,397	419,814	427,316
Males 20-24	392,736	398,002	405,164	411,986	419,250
Males 25-29	406,757	408,507	411,232	415,772	419,847
Females 10-14	387,362	395,174	401,951	406,023	407,107
Females 15-19	378,954	385,415	390,032	395,783	402,859
Females 20-24	378,148	384,012	391,389	398,524	405,146

Source: Adapted from Statistics Canada, Annual Demographic Statistics, 2000

Projected Percentage of Ontario's population by age group

	2001	2002	2003	2004	2005
0-14	19.2	18.9	18.6	18.3	18.0
15-64	68.2	68.4	68.5	68.7	69.0
65+	12.7	12.8	12.8	12.9	13.0

Source: Adapted from Statistics Canada, Annual Demographic Statistics, 2000

THE AGING POPULATION

The population aged 65 and over grew 9.6% between 1995 and 2000, from 3.51 million to 3.85 million, and will increase by 9.3% between 2000 and 2005 if current trends continue. The 80 and over population increased by 16.6% between 1995 and 2000, from 780,000 to 910,000, and could grow by 25.8% during the next 5-year period to reach 1.5 million in 2005.

At the bottom of the age pyramid in Canada, the population under age 15 is decreasing. It dropped 1.8% between 1995 and 2000, when it reached 5.87 million, and could drop another 4.3% between 2000 and 2005. This has short-term implications for the education system (elementary and secondary), where enrolment is gradually declining. However the decline was not evident in Ontario, Alberta and Nunavut.

This changing demographic of the workforce means that by 2011, 44% of population will be over 45 and the Canadian youth population will have decreased to 13.2%

IMMIGRATION

- In 1999-2000, Canada accepted 32,000 more immigrants than in 1998-99, or 205,000 as compared with 173,000.
- During the early and mid-1970s, net migration represented nearly 38% of the total increase in the population

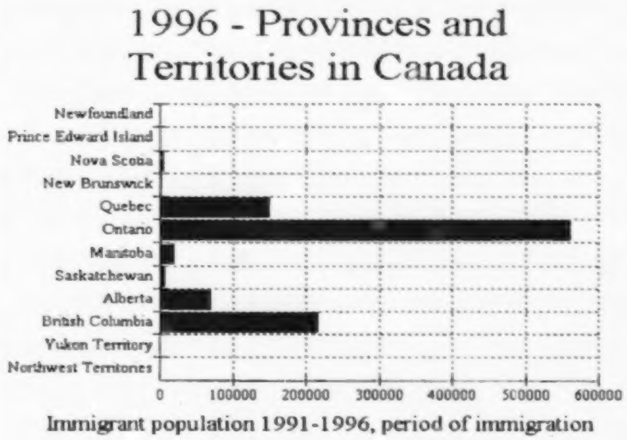
- Consistently high levels of arrivals between 1986 and 1996 accounted for about half of the population growth of Canada
- At the time of the 1996 Census, immigrants comprised just over 17% of the population
- By 1996, 27% of the immigrant population had been born in Asia and another 21% came from places other than the United States, the United Kingdom or Europe
- The top five countries of birth for immigrants arriving between 1991 and 1996 were Hong Kong, the People's Republic of China, India, the Philippines and Sri Lanka. Together, these five countries accounted for more than one-third of all immigrants who arrived in those five years.
- Proportionally more immigrants than Canadian-born have preferred to settle in urban areas, attracted by economic opportunities and by the presence of other immigrants from the same countries or regions of the world.
- In 1996, 85% of all immigrants lived in a CMA (Census Metropolitan Area), compared with just 57% of the Canadian-born population.

Source: Citizenship and Immigration Canada

Immigrants and Levels of Skill and Education

- In 1999, 133,201 immigrants were in the skilled and business classes.
- In 1999, 40% of immigrants to Canada held a university degree.
- In 1999, of all immigrants arriving in Toronto, 45% held university degrees.
- There is a 59% likelihood that someone has a university degree in a skilled immigrant household, while there is only 13% likelihood that someone has a university degree in a Canadian-born household.
- 10,279 immigrants arriving in the mid-1990s listed civil, mechanical or electrical engineering as their intended occupation.
- 5,770 of the number listed above were actually working in their intended occupation by April 1996.

Source: Statistics Canada; High Commission for the Republic of Kenya; International Reform Monitor; Maytree Foundation; Citizenship and Immigration Canada; Community Social Planning Council of Toronto, as reported by Hamida Ghafour, in The Toronto Star, June 17,2001. pg. A10



A leading factor for Ontario's growth, the most populous province at 11,513,800, was international migration.

Ontario received 57% of all immigrants to Canada in 1999-2000 and was also home to 44% of all non-permanent residents in Canada on July 1, 1999.

If these trends continue, Ontario's population could pass the 12-million mark in 2003.

Immigration				
Immigrants	**2000 Plan (as announced Nov. 1999)**	**Actual**	**2001 Range**	**2002 Range**
Skilled Workers	100,500-113,300	118,307	100,500-113,300	105,800-118,500
Business	15,000-16,000	13,645	15,000-16,000	15,700-16,700
Provincial/Territorial Nominees	1,400	1,249	1,400	1,500
Total Economic	116,900-130,700	133,201	116,900-130,700	123,00-136,700
Spouses, Fiancés and Children	42,000-45,000	42,702	42,000-45,000	44,100-47,000
Parents and Grandchildren	15,000-16,000	17,724	15,000-16,000	15,700-16,700
Total Family	57,000-61,000	60,426	57,000-61,000	59,800-63,700
Other – includes Live-in Caregivers	4,000	3,244	4,000	4,200
Total Immigrants	177,900-195,700	196,871	177,900-195,700	187,000-204,600

Source: Citizenship and Immigration Canada

Ontario's Population – Quick Facts

- Ontario's population grew by 152,000 in 1999-2000 to 11,669,344, representing close to 38% of Canada's population.
- The province's growth rate of 1.3% in 1999-2000 was a slight rise from 1.2% in 1998-99, and mainly the result of immigration. Of the 32,000 additional immigrants to Canada, 25,000 went to Ontario.
- An estimated 116,700 immigrants settled in Ontario in 1999-2000, about 57% of all immigrants who arrived in Canada, compared with 91,800 in the previous year.
- In addition, Ontario recorded strong net gains as a result of migration from other provinces.
- In 1999-2000, Ontario had a net inflow of 19,800, compared with 16,700 in the previous year.
- The 1998 life expectancy for men was 76.3, and 81.5 for women.
- The percentage distribution of Mother Tongue in Ontario is as follows:
    - English only 72.3
    - French only 4.5
    - Other 23.2
- Ontario's youth share declined in 1996, from 14.1% in 1991 to 13% in 1996
- Ontario's share of those 55 rose in 1996, to 21.5% from 20.7% in 1991
- In 1996, 42% of Toronto's population was foreign-born.

In the 1996 Census year, the Greater Toronto Area was home to more than 4.2 million people, but only 2.6 million listed English as their first language.

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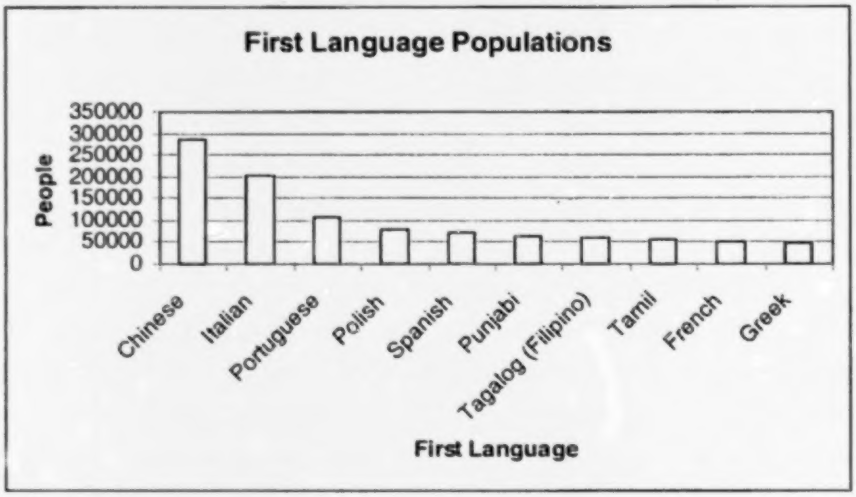
After English, the 10 most common first languages in Toronto:



Source: The Toronto Star

ONTARIO's MINISTRY OF FINANCE POPULATION PROJECTIONS:

- All regions of Ontario will experience growth. The GTA and surrounding regional municipalities are projected to grow from 5.1 million in 1999 to 7.5 million by 2028. The GTA's share of total Ontario population will rise from 44 per cent in 1999 to almost 49 percent, or close to one-half of Ontario's population, in 2028.
- Toronto's population is forecast to increase from 2.5 million in 1999 to 2.95 million in 2028. Growth in other regions of the GTA (Durham, Halton, Peel and York) will add about 2 million people to the GTA.
- The population of Central Ontario will grow from 2,545,000 to 3,379,000. Census Divisions surrounding the GTA (Simcoe, Dufferin, Wellington, Waterloo and Victoria) will continue to experience above-average growth.
- The population of Eastern Ontario will grow from 1,549,000 to 1,873,000 over the projection period. Ottawa-Carleton is projected to grow from 764,000 in 1999 to almost one million (955,000) in 2028.
- The population of South-western Ontario will grow from 1,508,000 to 1,747,000. Growth rates for South-western Ontario vary, with the Census Divisions of Elgin and Essex projected to have growth rates close to the provincial average.
- The population of Northern Ontario is projected to increase from 839,000 in 1999 to 868,000 by 2028. Growth rates within Northern Ontario vary.

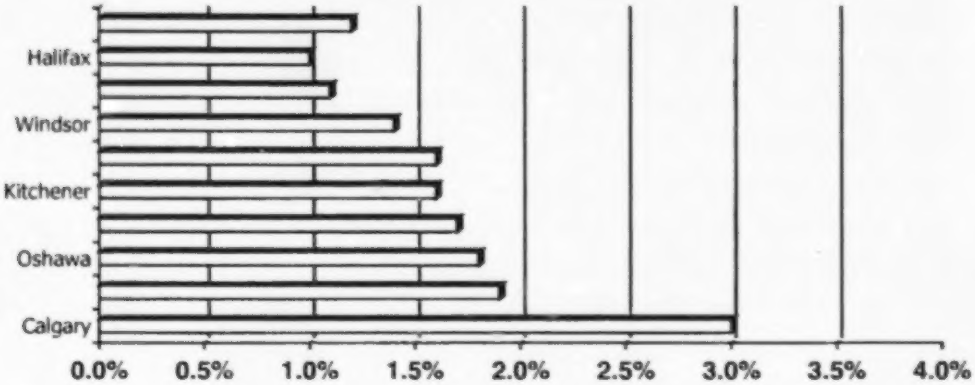
Ontario Population Projections Ages 15-24 by Gender, Every Fifth Year

Age	Gender	2001	2006	2011	2016	2021	2026	2028
15 to 24	Male	781,450	844,460	904,980	900,300	855,170	849,790	861,080
	Female	746,000	802,190	853,500	850,300	808,750	801,630	812,080

Source: Statistics Canada 1999 and Projections of Ontario Ministry of Finance.

As seen in the chart below, of the nine highest average annual growth CMAs, Ontario was home to five of them.

Canadian Census Metropolitan Areas with the Highest Average Annual Growth Rates, 1996 -2000



Ontario and U.S.: Shared-Border Demographics

- As of 2000, 22 metropolitan areas in the U.S. and three in Canada claim populations of 2 million or more people. Collectively these areas account for 138 million people or 45% of all people living in the two countries.
- Over the last decade those areas accounted for 47.5% of the population growth.
- Two of the five fastest growing metropolitan areas are shared-border metropolitan zones: one of the two is the Golden Horseshoe, involving Ontario and the state of New York.
- Collectively those areas reflect an uninterrupted area of settlement around Lake Ontario, beginning with Oshawa and Toronto and connecting Barrie to the north, Guelph and Kitchener to the west and Hamilton, Brantford and St. Catherines – Niagara to the south.
- The 10 metropolitan areas of the Golden Horseshoe account for 8.8 million people, rendering it the fourth most populace metropolitan area in the United States and Canada.
- Far more people live on the Canadian side (6.6 million) than the American side (2.2 million)
- Between 1990 and 2000 the Golden Horseshoe's population grew at an average annual rate of more than 104,000 people, the second fastest growing metropolitan area in absolute terms among the 25 most populated.
- There are 730 people per square kilometre in the GTA.[40]

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[40] Strategic Projections Inc. www.s-p-inc.com/diversions.htm

Components of Population Growth by Census Division, Ontario, 1998 - 1999

Region	NPR % of Population[1]	Natural Increase	Immigrants	Net Inter-provincial	Net Intra-provincial	Total Growth
Algoma	0.1	1.4	0.4	-2.0	-10.6	-13.7
Brant	0.3	2.8	1.3	0.8	2.7	6.0
Bruce	0.0	-0.5	1.0	0.4	-6.9	-7.5
Cochrane	0.1	2.9	0.4	-2.5	-11.4	-12.4
Dufferin	0.2	5.9	1.0	-0.3	15.1	19.6
Durham	0.3	6.9	1.8	0.9	10.6	17.7
Elgin	0.2	2.6	1.8	0.3	3.8	6.7
Essex	0.7	3.4	7.4	1.2	4.3	13.22
Frontenac	0.8	1.8	2.5	2.0	-3.0	1.9
Grey	0.1	-1.1	0.4	0.1	7.2	4.0
Haldimand-Norfolk	0.4	0.8	1.2	-0.2	5.1	5.2
Haliburton	0.2	-4.2	0.3	-0.8	12.9	7.1
Halton	0.7	5.7	3.7	2.2	8.0	16.4
Hamilton-Wentworth	0.7	3.0	6.0	1.0	-0.6	7.7
Hastings	0.2	1.1	0.7	0.2	1.0	1.9
Huron	0.1	0.2	1.1	-0.2	-4.8	-5.6
Kenora	0.3	9.0	0.3	-0.2	-0.9	6.0
Kent	0.3	1.4	1.3	0.4	-2.1	-0.5
Lambton	0.2	1.1	1.1	0.0	-2.7	-3.6
Lanark	0.1	0.8	0.6	1.9	3.4	6.0
Leeds and Grenville	0.2	-0.6	0.8	0.7	2.8	2.8
Lennox and Addington	0.0	-0.1	0.3	0.1	2.4	2.0
Manitoulin	-	0.5	0.3	0.9	7.5	7.9
Middlesex	0.5	3.9	4.6	0.1	-0.4	5.4
Muskoka	0.1	-0.8	1.0	1.3	16.9	17.2
Niagara	0.6	0.8	2.3	1.1	1.3	3.3
Nipissing	0.1	-	0.6	0.3	-2.0	-3.3
Northumberland	0.2	-0.9	0.7	0.4	9.0	8.7
Ottawa-Carleton	1.1	4.8	6.8	5.8	0.6	14.7
Oxford	0.4	2.9	1.4	0.3	2.4	5.0
Parry Sound	0.2	-1.3	0.6	-0.6	5.0	2.4
Peel	0.9	9.3	13.9	2.6	5.3	28.3
Perth	0.2	2.3	0.9	1.1	2.4	4.3
Peterborough	0.2	-0.8	0.9	0.6	3.5	3.5
Prescott and Russell	0.1	4.0	0.5	4.3	1.9	10.0
Prince Edward	0.3	-5.8	1.7	1.8	12.6	10.3
Rainy River	0.4	3.1	0.4	-7.9	-5.5	-12.4
Renfrew	0.0	1.6	0.6	0.2	-0.5	1.5
Simcoe	0.2	3.8	1.2	1.0	22.6	26.8
Stormont, Dundas and Glengarry	0.1	0.5	0.8	2.8	-3.0	0.4
Sudbury (District)	0.1	3.8	0.3	0.7	-8.1	-5.0
Sudbury (R.M.)	0.1	2.1	0.7	-2.6	-14.5	-16.1
Thunder Bay	0.2	2.5	0.6	-4.0	-4.2	-7.4
Timiskaming	0.1	-0.6	0.7	-0.3	-12.9	-14.8
Toronto Metropolitan	2.4	5.2	19.9	1.9	-19.1	5.8
Victoria	0.1	-0.6	0.4	-1.3	14.4	12.7
Waterloo	0.6	5.8	6.8	2.1	4.3	16.3
Wellington	0.5	4.8	3.5	1.8	11.8	19.3
York	0.8	6.4	8.2	1.1	31.4	43.9

Note: 1. NPR: Non-Permanent Resident

Source: Adapted from Statistics Canada, Annual Demographics Statistics, 2000

Estimates of Population for Census Divisions by Age Group, July 1, 2000

Region	10-14	15-19	20-24	25-29	Total Population
Algoma	8,788	9,051	8,368	7,180	126,467
Brant	9,377	9,317	8,470	7,718	126,481
Bruce	5,022	5,304	4,339	2,748	66,537
Cochrane	6,769	7,131	6,645	6,098	92,322
Dufferin	4,170	3,746	3,124	2,657	50,318
Durham	39,970	36,331	31,795	29,728	512,217
Elgin	6,245	6,246	5,789	5,028	84.182
Essex	25,652	25,326	26,667	29,812	381,672
Frontenac	8,728	8,926	9,529	10,460	139,517
Grey	6,240	6,759	5,820	4,310	91.127
Haldimand-Norfolk	8,340	8,643	7,521	5,494	109,536
Haliburton	1,033	1,028	777	610	16,146
Halton	25,974	24,496	22,643	23,258	375,705
Hamilton-Wentworth	33,403	32,312	31,941	34,851	498,553
Hastings	8,695	8,632	8,041	7,051	124,792
Huron	4,598	4,813	4,301	3,019	61,097
Kenora	5,853	5,595	5,010	4,578	68,643
Kent	7,957	8,530	7,907	6,990	112,897
Lambton	9,529	9,934	9,066	7,290	131,643
Lanark	4,522	4,329	3,494	3,172	63,015
Leeds and Grenville	6,744	6,493	5,910	5,387	100,128
Lennox and Addington	2,772	2,685	2,555	2,247	40,708
Manitoulin	964	1,022	814	699	13,046
Middlesex	28,414	27,666	27,853	31,037	412,976
Muskoka	3,642	3,719	3,201	2,566	54,712
Niagara	28,336	27,358	26,934	26,499	423,600
Nipissing	5,941	6,128	6,105	5,254	84,985
Northumberland	6,300	6,230	5,107	4,045	86,776
Ottawa-Carleton	50,828	48,132	50,618	61,161	779,274
Oxford	7,516	7,534	6,803	6,185	102,561
Parry Sound	2,562	2,806	2,437	1,764	41,683
Peel	70,311	69,665	70,371	75,869	1,008,163
Perth	5,425	5,693	5,256	4,754	75,283
Peterborough	8,935	8,788	8,136	7,142	128,881
Prescott and Russell	6,190	5,744	4,715	4,132	79,061
Prince Edward	1,812	1,891	1,514	1,158	26,360
Rainy River	1,713	1,770	1,617	1,390	23,277
Renfrew	6,753	6,722	6,454	6,333	100,407
Simcoe	28,193	25,777	22,579	21,183	377,405
Stormont, Dundas and Glengarry	8,249	8,184	7,493	6,286	115,884
Sudbury (District)	1,657	1,874	1,631	1,467	25,834
Sudbury (R.M.)	10,354	11,374	11,675	10,972	160,739
Thunder Bay	10,783	11,092	10,567	10,972	158,698
Timiskaming	2,594	2,787	2,605	1,726	36,788
Toronto Metropolitan	141,339	138,140	158,953	213,645	2,542,844
Victoria	5,188	5,098	4,332	3,087	73,134
Waterloo	31,878	30,637	31,276	33,993	446,833
Wellington	13,788	13,103	12,568	14,023	191,459
York	53,300	52,935	49,338	46,957	724,969

Source: Adapted from Statistics Canada, Annual Demographics Statistics, 2000

Characteristics: Population by Economic Region – Annual Average

	1999	2000
	000s	
Ontario	**9,111.1**	**9,274.4**
Ottawa	888.1	900.9
Kingston -- Pembroke	330.0	332.6
Muskoka - Kawarthas	283.8	287.8
Toronto	3,938.0	4,034.6
Kitchener - Waterloo - Barrie	809.2	830.1
Hamilton - Niagara Peninsula	1,031.0	1,045.8
London	467.0	472.1
Windsor - Sarnia	488.8	495.2
Stratford - Bruce Peninsula	230.8	232.3
Northeast	462.5	461.5
Northwest	181.4	181.4

Source: Statistics Canada, Historical Labour Force Survey, 2000, CD-ROM Format

✳ See a complete population breakdown of economic regions on the ACAATO website:
http://www.acaato.on.ca/new/research/scan/2002/webonly/

*Statistics Canada defines **urban areas** (UAs) as a population concentration of 1,000 people with a density of at least 400 persons per square kilometre based on the previous census population counts. All territory outside urban areas is considered **rural.***

Urban/Rural - Ontario, Both Sexes, Population Age Group 15 years and over
000s

	1996	1997	1998	1999	2000
Total Urban/Rural	8,681.0	8,821.8	8,966.6	9,111.1	9,274.4
CMA/CA	7,445.0	7,556.3	7,676.8	7,821.4	7,985.6
Urban Core	6,545.0	6,625.0	6,767.3	6,852.7	6,953.6
Urban Fringe	159.6	181.4	183.5	181.5	200.3
Rural Fringe	740.4	749.8	726.0	787.3	831.7
Non-CMA/CA	1,236.0	1,265.5	1,289.8	1,289.7	1,288.8
Small Town	434.5	437.6	423.6	452.0	451.1
Rural	801.5	827.9	866.2	837.7	837.7

Source: Statistics Canada, Historical Labour Force Survey, 2000, CD-ROM Format

Urban Rural Population Split (1996 Statistics Canada Census)

	Urban	**Rural**
Canada	77.9%	22.1%
Ontario	83.3%	16.7%
Northern Ontario	69.6%	30.4%

ONTARIO CENSUS DIVISIONS BY OECD CLASSIFICATION

Predominantly Urban Regions Include:

Ottawa-Carleton; Metropolitan Toronto; Peel, Halton; Hamilton-Wentworth; Waterloo; Middlesex

Intermediate Regions include:

Frontenac; Peterborough; Durham; York; Wellington; Niagara; Brant; Kent; Essex; Lambton; Sudbury; Algoma; Thunder Bay.

Predominantly Rural Regions and Rural Northern Regions include:

Cochrane; Kenora.

Rural/Metro Adjacent Regions include:

Stormont, Dundas and Glengarry; Prescott and Russell; Leeds and Grenville; Lanark; Lennox and Addington; Hastings; Prince Edward; Northumberland; Victoria; Dufferin; Haldiman-Norfolk; Perth; Oxford; Elgin; Simcoe; Nipissing; Sudbury.

Rural/Non-Metro-Adjacent Regions include:

Huron; Bruce; Grey; Muskoka; Haliburton; Renfrew; Parry Sound; Manitoulin; Timiskaming; Rainy River.

Urban/Rural Designations – Geography Supplement, 2001 Census Consultation Guide

In the past (since the 1976 Census) the approach to urban/rural definition worked well to measure the social and economic impact of urbanization at the national, regional and provincial levels and for large CMAs.

There have, however, been indications that the simple urban/rural dichotomy, even with the urban core, urban fringe and rural fringe variant within CMAs and CAs, is no longer sufficient. It has been argued that important differences in the social and economic well-being of Canadians are masked by the current urban/rural dichotomy and, consequently, a better classification that reflects the urban/rural continuum is required.

Some discussion took place (prior to the 2001 Census) in-part around the following:

- greater sub-classification of urban core, urban fringe and rural fringe areas (for example, retail centres versus suburbs).
- Further geographic differentiation of rural Canada. For example, extending the current Census Metropolitan Area concept to define zones of metropolitan influence and/or incorporate elements of north and south (for example, "remote North") in the definition of rural areas.

It was noted that, increasingly, data users have indicated that there is insufficient differentiation of the area, which Statistics Canada defines as rural. Currently, the rural areas found within CMA/CAs (rural fringe), outside CMA/CAs but within close proximity and in northern remote areas are all grouped together under the same definition.

It was recommended from the Statistics Canada 2001 Census geography consultation process, that "the status quo will exist with respect to the urban and rural concept for the 2001 Census." Depending on the success of the 2001 Census automated system development, the Geography Division may be able to use the new data to delineate the urban areas. Otherwise, as in the past, the previous census data (1996 data) will be used.

REGIONAL GROWTH

In March 2000, the Harris government announced the formation of the Task Force on Rural Economic Renewal, to consider ways to spur economic growth in small-town Ontario. Some major recommendations to help rural communities stay competitive in a constantly changing global economy include:

- The four-year, $35 million Rural Youth Job Strategy Fund helps train rural youth and creates jobs in rural Ontario. It is estimated that over 17,300 jobs and work experiences for rural youth will be created province-wide as a result of these projects.
- Community Access Program – under this partnership with Industry Canada, the Ontario government has helped approximately 320 rural communities establish public Internet and computer training centres.
- The network of Self-Help Offices and Business Enterprise Centres in rural Ontario has been expanded.
- Connect Ontario is an $82 million investment to develop a network of 50 "smart" communities across Ontario by 2005. Through innovative partnerships among community organizations, governments, local businesses and others, this initiative will create jobs, spur new investment, and help economic development.

> **Step 7** of the Ontario government's 21 step action plan states in part, " to build on our regional economic strengths and help communities reach their economic potential, the government will pilot regional economic development "Resource Jump Teams." These teams will help communities take advantage of emerging opportunities to strengthen their local economies."[41]

"For the sake of equity and the health of the overall state economy, rural communities need appropriate support for both education and economic development. Rural community colleges are uniquely positioned to provide both. Indeed, they are often the only institutions in rural areas that can lead both *place-based* economic development and *people-based* education and training."[42]

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[41] http://www.premier.gov.on.ca/english/library/21steps.pdf

[42] Rural Community Colleges: Catalyst for Economic Renewal. Policy Paper for Education Commission of the States. September 1998.

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Ontario College and Government Initiatives

Section Six

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This section contains information about the middle ground where the government and college sector meet. Opportunities to address public concerns and industry requirements abound in Ontario in this new millennium. In order for colleges to carry out their common vision of quality-driven innovation, accessibility and community leadership and the government's commitment to a place for every willing and qualified Ontario student in college or university, collaborative effort is required.

In an article, *Three Litmus Tests For Throne Speech*, written for the Toronto Star, January 30, 2001, the author looked for three distinct measures in the Federal Throne Speech:

- An unequivocal commitment to invest in affordable housing;
- Concrete measures to reduce child poverty; and
- A package of programs to make postsecondary education affordable

"The Liberals have made a start. They set up a Registered Education Savings Plans to help middle-income parents set aside money for their children's education. They're promising Registered Individual Learning Accounts to help working Canadians improve their skills.

"What is missing is a program directed at low-income students, who face the greatest education barriers. We would recommend a refundable tuition credit for kids from low-income families (much like the current GST credit). This would put university or college within reach of thousands of students who can't afford postsecondary training."

"The lavish days of government spending are long gone. But there is still a place for intelligent public investment in Canadians who need a boost, a hand or a home."

Author not available, retrieved from: Electric Library Canada

2001 Provincial Government Throne Speech

The speech outlined 21 Steps into the 21st Century. The three central themes were:

- Fiscal Responsibility
- Accountability
- Economic Growth

✳ *The entire speech is available at:* http://www.premier.gov.on.ca , *click on speeches.*

Budget 2001 Highlights

(not included in other sections of the Scan)

- The government will increase investment in postsecondary education operating grants by $293 million, a three-year commitment, and directly proportional to enrolment growth. In 2001 – 2002 there will be an approximately 2% increase in the operating grant
- Significant increases in funding to enhance services and support for people with developmental disabilities, abused women and children and community mental health facilities.
- Continued investment in SuperBuild, projects of $1.9 billion in 2001 –2002.

There is concern, however, that there will not be sufficient funding for postsecondary institutions to meet the expectations of accountability and balanced budgets.

Full text of the budget is available on the government's website:
www.gov.on.ca/FIN/hmpage.html

A New Charter for Ontario Colleges

- On April 26, 2001 it was announced that the government will introduce a new charter for colleges to reform the governance model of Ontario's colleges to allow them to become more flexible, entrepreneurial, responsive and market-driven.
- The Ontario Jobs and Investment Board (1999) and the Investing in Student Task Force (2001) have joined a call by college Boards of Governors for a new charter to meet Ontario's increasing need for advanced training to achieve prosperity in the global economy.
- A college charter is a legislative, regulatory and policy framework that governs colleges. A charter describes the boundaries and opportunities within which colleges operate.
- The founding college charter, the Ministry of Colleges and Universities Act, 1965, (appropriate for the early establishment of colleges as Schedule 3 crown agencies) no longer provides the flexibility colleges require to be responsive to the marketplace. In addition, the government has recently updated its agency structure into new groupings and Schedule 3 no longer exists. As the government is currently examining new and alternate categories to determine which is most appropriate for colleges, now is the time to create a new college charter.
- ACAATO's 25 member Boards of Governors will continue working with the Ministry of Training, Colleges and Universities and education and training partners to ensure that the legislative component of the charter is enacted by December 2001.

Ontario's Colleges for the 21st Century: Capacity and Charter Framework, ACAATO, 2000. ACAATO, May 2001, complete document available on the ACAATO website at:
www.acaato.on.ca -> Publications -> New Charter

Public Sector Accountability Act

- The introduction of a new Public Sector Accountability Act, on May 9, 2001, will require that all major organizations funded by the government:
  - balance their books each year
  - prepare and publicly disclose a business plan and monitor their performance against this business plan
- An *Accountability Office* will be created in the Ministry of Finance to evaluate entire sectors, as well as individual institutions in each sector.
- The act was not passed in the spring 2001 legislative session.

Equity in Education Tax Credit

In the 2001 Ontario budget, the government announced its support for equity and choice in education by proposing a partial tax credit for parents of children attending kindergarten, elementary and secondary school at independent schools. The Equity in Education Tax Credit would assist parents who want their children educated in their religion and culture but find the cost of sending their children to independent schools prohibitive.

Critics say that the difficulty with such a credit is that it pulls funding support directly out of the public school system. As the funding to school boards is based on enrolments, $7,000 will be lost to public schools for every student who enrols in a private school.

The proposed credit would be phased-in over five years, beginning in the 2002 taxation year, and would cover up to 50 per cent of the eligible tuition costs paid to an independent school. In the first year, the maximum annual value of the credit would be $700 for each child enrolled, and would rise to $3,500 when fully implemented in 2006.

There are 734 independent schools in the Province of Ontario. 102,970 of the 2.1 million students currently enrolled in Ontario's elementary and secondary schools, are enrolled in independent denominational and non-denominational schools.

Bill 132 Update

Legislation passed on December 20, 2000, will offer Ontario's students expanded choice in postsecondary education. The Postsecondary Education Choice and Excellence Act, 2000, will:

- Allow private, degree-granting institutions to apply for consent to operate in Ontario;
- Allow colleges of applied arts and technology to apply for consent to grant applied degrees;
- Ensure that all new private postsecondary institutions provide appropriate financial protection for students before these institutions are given consent to offer degrees in Ontario;
- Give the government an additional tool to protect the public interest in the proper administration of the Ontario Student Assistance Program (OSAP).

Quality Assessment Board Announcements

The Quality Assessment Board will assess and advise the Minister of Training, Colleges and Universities on proposals for new degree programs to be offered by Ontario colleges and new institutions wishing to offer degrees in Ontario. The board will have 10 members in addition to the chair. The members will include academic, business, and student leaders.

- In April 2001, it was announced that Dale Patterson has been appointed chair of the Postsecondary Education Quality Assessment Board (pending the review of the Standing Committee on Government Agencies).
- Don Baker has been appointed director of the board.

Key components of the provincial government's plan to address the double cohort include:

- An investment of $1.8 billion by the Ontario Government and its partners to meet the projected increase in demand for spaces in Ontario's colleges and universities. This commitment to renew and expand colleges and universities will create 73,000 new student places.

- An additional investment of $140 million for deferred maintenance will help the institutions maintain their existing infrastructure and use existing space more efficiently to create room for additional students.

Under the Access to Opportunities Program (ATOP):

- A $228 million investment in the first three years of the program is creating 23,000 new spaces for students in computer science and high-demand engineering programs. The private sector has contributed another $136 million to this program, which prepares students for careers in high demand areas in the economy. In the 2001 Ontario budget, it was announced that ATOP will continue with an allocation of $86 million in 2001-02.

Government Remedies for the Cost of Postsecondary Education:

- Tuition fee increases in most programs have been capped at 2%, per year, for 5 years.
- Universities and colleges that increase tuition fees are required to set aside a portion of their increased tuition revenues to provide aid to students in need. This aid is estimated to be $125 million in 2000-01.
- Under the Ontario Student Opportunity Trust Fund, permanent trust funds with a total value of $600 million will provide assistance for up to 185,000 students over a 10-year period. The Ontario Student Opportunity Grants program ensures that no student incurs more than $7,000 of debt per year of study.

Expanded skills training:

- An investment of $33 million by 2004-05 will double the number of entrants to apprenticeship programs in the skilled trades – from 11,000 to 22,000.
- The government is investing $50 million over five years for up-to-date equipment and facilities for apprenticeship programs in colleges.

Key Performance Indicators

- Based on themes of accountability and excellence, the KPI project is a collaborative venture between Ontario's 25 colleges of applied arts and technology and the Ministry of Training, Colleges and Universities.

✱ *System-wide KPI results can be viewed on the ACAATO website at www.acaato.on.ca -> KPI*

Sound Familiar? U.S. Institutional Factors in Higher Education Reform
In a recent monograph published by the American Council on Education, ACE identified pressures for reform in higher education.

External issues they identified included:
- Cost containment and affordability
- Public demands for education and financial accountability
- Increased demands for educational quality and excellent teaching
- The growth of alternative modes for postsecondary education delivery
- Globalization of knowledge
- Preserving an increasingly diverse society
- The impact of technology

Internal pressures identified included:
- Curricula reform by faculty and students
- Student demands for more customer service in the classroom as well as more academic support
- Expectations of adult learners and non-traditional students
- Terms and conditions of faculty employment, including retirements, alternative appointments, and part-time and adjunct faculty
- Higher levels of computer literacy on the part of students.

In a recent legislated study regarding higher education governance in Colorado, the Northwest Education Research Centre (NORED) group identified trends they thought important to state:
- a shift from regulation to market forces
- from rational planning to strategic planning for dynamic market models
- from a focus on geographic boundaries to service areas defined by the needs of clients
- from centralized control and regulation to a more decentralized management.

Responding to the Educational Reform Movement, Cynthia M. Heelan, Community College Journal, AACC, December 2000/January 2001 pg. 3

Ontario Institute of Technology
- Sixty million dollars in capital funding from 2000 – 2001 has been provided to establish Ontario's newest university, the Ontario Institute of Technology in Durham region that will offer both college and university programming.
- Durham College plans to open the Institute in September 2003.

Investing in Students Task Force

The Investing in Students Task Force was established to advise the Minister of Training, Colleges and Universities on ways to ensure that public funds supporting postsecondary education are directed at providing the highest quality of education while ensuring access for students, affordability and accountability.

"Ontario postsecondary institutions face many challenges as global competition for talent and investment increase, technology and e-learning continue to change how and where students learn, and students become more demanding consumers of education.

How Ontario responds to these challenges will determine how well our students and institutions succeed in the future, and provide the foundation for growth and continued success. Maintaining the *status quo* will not prepare us for the future. We must continue to "raise the bar" in postsecondary education through innovation and the pursuit of excellence."

Trends were identified by the 239 college submissions received by the task force. They included:

- Articulation of vision, mission and mandate
- Importance of student-centred services
- Increasing public accountability, measurement and reporting
- Increasing collaboration and acceleration of best practices

In February 2001, the report "Portals and Pathways – A Review of Postsecondary Education in Ontario" was delivered to the ministry.

INVESTING IN STUDENTS TASK FORCE REPORT HIGHLIGHTS

Improved public accountability and service for students:

- creating a seamless transfer system to allow students to move easily from one form of postsecondary education to another
- developing a single window of information for students considering applying for postsecondary education
- simplifying and co-ordinating student financial assistance policies
- encouraging the collaborative development of e-learning programs

The task force also recommended that colleges and universities promote open and transparent public accountability by publishing an annual report containing information about their mission, key strategies and accomplishments, audited financial statements, and outcomes on performance indicators.

Further, the report identifies ways in which colleges and universities could improve effectiveness by sharing services, cutting red tape and adopting cost-effective best practices. The task force also recommends that a new charter for colleges be developed to strengthen their role in promoting partnerships and specialized missions.

BEST PRACTICES IN ONTARIO AND OTHER JURISDICTIONS

(excerpt from ISTF Portals and Pathways Support Document)
In conducting its review of postsecondary education, the task force examined best practices in Ontario and comparable initiatives in other jurisdictions. The task force also examined options for shared services, finding "best of class" examples of service provision, concentrating on issues of common service delivery and good administrative practices (e.g., information technology, procurement and data collection).

The document includes four reports:

- Annotated Case Study Bibliography on Administrative Best Practices in Postsecondary Institutions
- Compendium of Innovative Administrative Practises in Ontario Universities and Colleges

- Best Practices in Colleges in the United States and England: A Review for the Task Force on Investing in Students
- Aligning Incentives to Efficiency and Effectiveness Outcomes.

The Annotated Case Study Bibliography is divided into 12 chapters, each dealing with a distinct administrative function:

- Administration
- Human Resources Management
- Financial Management and Reporting
- Procurement and Purchasing
- Facilities, Maintenance and Equipment
- Information Technology (IT) Administration Systems/E-Processing
- Web Environment/E-Learning
- Library Services
- Ancillary and Student Services
- Special Populations
- Benchmarking and Performance Indicators
- Public Sector Policy/Governance

Portals and Pathways and Resource and Support Documents are available on the Ministry of Training, Colleges and Universities website at:
http://www.edu.gov.on.ca/eng/general/postsec/tasknew.html

- On February 8, 2001, the *Advisory Committee for Online Learning* presented Brian Tobin, Ministry of Industry, and Glenn Hagel, Chair of the Postsecondary Expectations Consortium of the Council of Ministers of Education, Canada with a report urging governments, universities, colleges and businesses to accelerate and co-ordinate efforts to offer Canadians online postsecondary education.
- The report advocates the use of online learning through Internet or Intranet to meet individual needs, incomes, languages and learning styles. Recommendations included: making the Internet more accessible and affordable, especially broadband service; training faculty to make better use of educational technology in teaching; creating a comprehensive source of information on all Canadian online learning resources; developing more quality online learning resources; developing more quality online Canadian learning content and; increasing research in learning, both traditional and online.

The committee's report, ***The E-learning E-volution in Colleges and Universities: A Pan-Canadian Challenge*** is available online at: http://www.schoolnet.ca/mlg/sites/acol-ccael/
Industry Canada News Release, February 8, 2001.

Ontario Knowledge Network for Learning and eCAAT

In September 2000, funding was received from the Ontario Knowledge Network for Learning to develop a college-wide Distributed Learning Network business case. The project was to provide a picture of the magnitude and diversity of distributed learning activity existing in the college sector, with the goal of making learning available anytime and anywhere in order to meet individual learning needs.

The business case identified a DLN (Distributed Learning Network) model, which incorporates innovation, collaboration and partnerships, including:

- a status review of current distributed learning infrastructure among the CAATs and determination of future needs;
- analysis of the current supply/capacity within individual colleges to support a DLN;
- recommended structures, incentives and governance policies to ensure that the goals of access and educational excellence are achieved; and
- a cost/benefits analysis of the recommended approach to a Network

In March 2001, the eCAAT business case was delivered to government for consideration.

Ontario Learning College Project: The Ontario colleges are participating in the *"Learning College Project of the League for Innovation in the Community College."* Membership on the "Ontario College Learning Steering Committee" includes representatives from the colleges, University of Toronto, Michener Institute and the League for Innovation "Vanguard Colleges". The work of the committee will focus on:

- Sharing "best practices" in learning-centred education.
- Offering regional and provincial professional development initiatives stressing learning effectiveness and the sharing of best practices and research.
- In partnership with the University of Toronto, pursuing and documenting research and discussions that develop the theory of learning and providing evidence of the strategies that most effectively facilitate learning.

Health Sector - Highlights of the Federal Health Action Plan:

- An $18.9 billion increase to the cash component of the CHST over five years, which the provinces and territories will be able to use for health care
- A $1 billion fund that the provinces and territories can use to upgrade hospital and diagnostic equipment
- An $800 million to fund projects to provide better access to doctors, nurses and frontline health care services
- A $500 million to fund better information technology in the health care system
- A Joint Action Plan for governments to work collaboratively in areas like primary and home care, doctor and nurse supply, pharmaceuticals and others
- A commitment between governments to report to Canadians on how their tax dollars are being spent in the health care system
- Regular reporting to Canadians on how the system is performing.

Nursing Shortages in Canada

"The Canadian Federation of Nurses Unions (CFNU) conservatively pegs nursing shortages at about 20,000 across the country and expects that number to reach as high as 113,000 by 2011."

David Brown, Canadian HR Reporter, January 15, 2001 pg. 1

Update on Funding for Nursing Education

Beginning January 1, 2005, the College of Nurses of Ontario will require registered nurses to have a baccalaureate degree in order to register to practice in the province. On January 19, 2001, the Minister of Training, Colleges and Universities, Dianne Cunningham, and Minister of Health and Long-Term Care Elizabeth Witmer announced that the Ontario government will invest an additional $49 million in enhanced university and college nursing programs that will educate more nurses to meet the challenges of 21st century health care.

- In total, the Ontario government has committed more than $70 million in new funding for nursing education since April 2000.
- Over the next three years, the new college and university programs will increase the number of new nurses graduating each year in Ontario to 2,800 - an increase of 1,100, or 60%, over 1999-2000.
- The funding announcement includes $14.7 million for fast-track nursing programs that will allow students to earn their four-year degree in a shorter period of time. These transitional programs will operate for three years.
- Another $24.3 million will be invested over three years to increase nursing enrolment and an additional $10 million will be used to cover one-time costs including the purchase of new equipment, library holdings and developing curriculum.

✳ For more information on funding for the new education standards in nursing, visit http://www.acaato.on.ca/new/research/scan/2002/webonly/

Centre for Excellence in Lifelong Learning

The Ontario Government announced on January 9, 2001, that it will establish a centre for excellence in lifelong learning to expand the range of flexible, high-quality learning programs available to students of all ages. The centre will be created through the transfer of the staff and resources of the Ministry of Education's Independent Learning Centre (ILC) to the New Media Division of the Ontario Educational Communications Authority (TVOntario).

Service to Assess Immigrant Academic Credentials

November 2000 - A new service to help immigrant job seekers gain entry into the workforce was opened. The service, provided by World Education Services, assesses the secondary and postsecondary academic credentials of immigrant job seekers.

- World Education Services will help immigrants get recognition for their educational qualifications, which will help them find good jobs where they can share their knowledge and skills, as well as create new businesses and jobs.
- The Ontario government created this service to meet the needs of immigrants who require academic credential assessment to match their educational achievements to the needs of employers. About 66% of working-age immigrants who settle in Ontario have some postsecondary education or trades training.

- Employers can use the service to assess educational achievement of immigrant job seekers. The service is also a building block for rural and remote communities to attract qualified immigrants to help build local economies.

The Canadian Council of Professional Engineers charges $175 for evaluation of foreign credentials.

$12 million Ontario government investment helps foreign-trained Ontarians to strengthen the provincial economy

- On May 29, 2001, the Ontario government announced that it has committed $12 million over three years to launch innovative training projects to help foreign-trained Ontarians gain speedier access to their professions in Ontario.

"These made-in-Ontario projects will reduce the time required for qualified Ontarians to meet provincial standards and contribute to our growing economy. Our government is working with employers, educators, trainers and occupational regulatory bodies to eliminate critical skills shortages in key sectors."
Dianne Cunningham, Minister of Training, Colleges and Universities, May 29, 2001

- In last year's budget, the Ontario government invested $3.5 million to support two projects to allow qualified foreign-trained nurses and pharmacists the opportunity to acquire the additional education and skills they need to meet Ontario standards without duplicating learning they have already gained elsewhere. The projects are now under way and have established sustainable processes for foreign-trained healthcare professionals that can be expanded to other sectors, professions and regulated occupations.

Ontario Student Loan Harmonization Act, 2001:

Legislation to allow joint administration of the Canada and Ontario student loan programs (Bill 19)

- With national banks withdrawing from student loan programs later this year, Ontario needs to join other jurisdictions in finding an alternative delivery method.
- The act, if passed by the Legislature, would allow the Ontario government to put new financial and administrative arrangements in place that ensure that Ontario Student Loans are available to students as of August 1, 2001.
- The federal government has passed legislation that gave it the authority to introduce a direct loan program for the Canada Student Loan portion of student assistance. That loan program is being administered by independent service providers.
- The Act would provide the Ontario Government with the authority to enter into an agreement with the federal government for joint administration of the Canada and Ontario student loan programs.

✳ For more details visit the OSAP website: http://www.osap.gov.on.ca

Trends: e-government

- E-government, when fully implemented, will mark a dramatic shift in governance and will offer a fundamental restructuring of the way governments operate and interact with their citizens.
- The outcome of that race for e-government will go a long way, analysts say, to determine which countries and communities are best able to take advantage of New Economy efficiencies and thereby enjoy new levels of prosperity.[43]
- It is estimated that the Canadian government could cut its total spending by about $15.2-billion or 20% of what it spends on providing information and services, which accounts for between 45% and 50% of the federal budget.
- The Canadian government has set a goal of delivering all possible services over the Internet by 2004.

According to results from an Ipsos-Reid survey released February 8, 2001,

- 64% of Internet users indicated they would 'be very likely' to do business online with their local government
- 32% would be 'somewhat likely'
- 68% of Canadians currently have access to the Internet either at home or at work.
- Key services to be used include: general municipal information (80%), applications or permit forms (78%), and offering input on public issues (68%)

To read more about Canadian e-government and what ***Forrester Research*** *has to say; or the results of an* ***Ipsos-Reid Study*** *on Online Tax Filing, visit the ACAATO website at http://www.acaato.on.ca/new/research/scan/2002/webonly/*

Report of the Task Force on Provincial Rural Economic Development

In April 2001, submitted its report which found 10 common challenges to rural economic growth, suggesting the need for:

- A province-wide Rural Economic Renewal Strategy
- Effective co-ordination among federal, provincial, regional and local economic development organizations
- Access to business and economic development advisory services – i.e. export assistance and entrepreneurial counselling
- ***Skilled labour in rural Ontario – establishing a province-wide Ontario Jobs Council would help satisfy human resources objectives***
- Accessibility to start-up and venture capital in rural Ontario
- Improvements to the overall profitability of agriculture sector
- ***Enhancing education, health and social services provided in rural areas***
- Infrastructure enhancements

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[43] Simon Tuck, *Dawn of the e-state*, Globe Technology, The Globe and Mail, Thursday, March 22, 2001.

- Community leadership in rural economic development
- Reduced red tape

Impact of Canadian Think Tanks on Policy and Elections

"Canadian think tanks play a important role in policy debate by providing new and independent views that can presage or influence actual events. There may be no scientific paternity tests for most public policy innovations – media, public opinion and a government's own research also serve as major influences on politicians and policy developers – but clearly the public is well served by a robust think tank community.

"To remain charities, think tanks have to pretend that they aren't out to influence government – even though that is exactly what they're trying to do."[44]
Some examples of Canadian think tanks:

- The Frasier Institute
- CD Howe Institute
- Caledon Institute of Social Policy
- Centre for Policy Alternatives
- Canadian Policy Research Networks Inc.
- Parkland Institute

Because of a perceived shortage of public policy research, in 1997 Ottawa created a Policy Research Secretariat.

Government Influence
The non-partisan Public Policy Forum surveyed two groups of VIP respondents. One was senior executives in corporations across Canada; the other, upper-level officials in federal departments and agencies, from deputy ministers down to directors. Each group was asked to rate the influence over federal decision-making exercised by various participants in that process.

- Only 12% of corporate executives felt members of the House of Commons have great or moderately great influence in decision-making (compared with 63% for cabinet ministers and 60% for the prime minister's staff).
- Among the federal officials, MPs stood at just 7%

Geoffrey Stevens, Maclean's. February 5, 2001. vol. 114, Issue 6.

Research and College Opportunities

"Research contributes to the cultural, social and economic health of communities, regions, Canada as a whole, and the global community; to the development of a highly educated and effective work force, a new generation of researchers, and people who can access the research of others; and the broad education of citizens."[45]

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[44] Peter Shawn Taylor, *The Idea Peddlers*, National Post Business Magazine, December 2000.
[45] Association of Canadian Community Colleges, from: *A Report on Public Expectations of Postsecondary Education in Canada*, Council of Ministers of Education, Canada, 1999.

The Federal Government is investing $100 million over five years for research focusing on four broad areas concerning the New Economy. The four major areas are:

- Management
- **Education**
- **Lifelong Learning**
- Broader issues concerning the nature of the New Economy.

The Social Science and Humanities Research Council (SSHRC) is developing a new funding program for the research.

THE CANADIAN FOUNDATION FOR INNOVATION

On July 26, 2000, the Canada Foundation for Innovation announced an additional investment of $8.5 million for 21 projects in 15 institutions under the College Research Development Fund. The fund was established to assist Canadian colleges and institutions to develop and strengthen their research infrastructure.

The following Ontario CAATs received funding from the Canadian Foundation for Innovation for 2000:

Institution	Project Title
Fanshawe College	The Impact of Short-Term Variations in Urban and Rural Air Quality on Human Health.
Niagara College	Niagara College Industrial Solutions Research Unit (ISRU)
Sault College	Understanding Forest Ecosystem Responses to Climate. Change and Intensive Forest Management
Sault College	Impacts of Hydro-electric Dam Operations on River Ecosystems
Sheridan College	The Sheridan Elder Research Centre: interdisciplinary psychosocial approaches to aging, social services/gerontology, design, the Internet, consumerism, intergenerational study, and the creative arts.
Sir Sandford Fleming College	Applied Technologies for Healthy Aging Research Laboratory

THE NATURAL SCIENCES AND ENGINEERING RESEARCH COUNCIL

In December 1999, the NSERC announced that it had revised its policy and mission statement to include college and institute participation in project research programs. Under the revised policy, researchers from those colleges and institutes that have been declared eligible by NSERC can participate in project research programs, as co-applicants with university professors.[46]

THE CANADIAN INSTITUTE OF HEALTH RESEARCH

Launched in June 2000, the Canadian Institute of Health Research replaced the Medical Research Council of Canada. The CIHR funds 3,000 researchers in academic settings, teaching hospitals, and research institutes. CIHR's eligible recipients include:

- researchers, scholars, ***health professionals affiliated with Canadian postsecondary institutions***,

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[46] College Canada, Association of Canadian Community Colleges, Vol. 5, Issue !, 2000

- non-governmental organizations (including community organizations and regional health authorities) with a research or research dissemination mandate; and
- scientists and scholars working in government.

EDUCATIONAL TECHNOLOGY TAX INCENTIVE (ETTI)

The Educational Technology Tax Incentive is designed to encourage Ontario businesses to support Ontario's community colleges and Ontario's universities in acquiring new teaching equipment and learning technologies. In June 2001, the Ministry of Finance, Corporate and Commodity Taxation Branch made the Tax Legislation announcement regarding calculating the ETTI. The ETTI is available to businesses that donate or give special price discounts on new eligible equipment or eligible learning technologies to an eligible educational institution after May 2, 2000.

View the entire release (including calculation figures) at:
http://www.gov.on.ca/FIN/english/tb01e7.htm#a

Public Opinion:

- A March 2001 survey by Ipsos-Reid found that Healthcare (56%) and Education (44%) were top issues for Ontarians.
- By May 4, 2001, Ipsos-Reid found that Ontarians who said education was the most important issue had jumped 14 points (to 58%) since the March poll.

Recent Federal Investments in Direct Support for Postsecondary Education

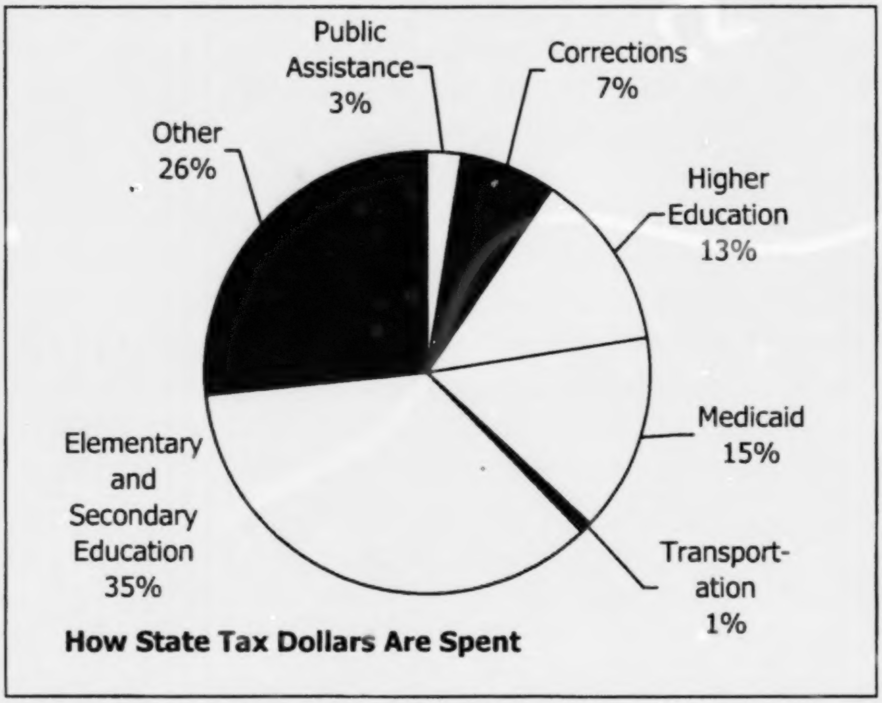
Initiatives	**2000-01**	**At Maturity***
	($ millions)	
Financial assistance to students		
Millennium scholarships (expected annual flow)	300	300
Canada Study Grants	100	100
Canada student loans - program renewal and helping graduates manage debt	293	293
Subtotal	**693**	**693**
Support for advanced research and graduate students granting councils (excluding Medical Research Council) and Networks of Centres of Excellence	160	160
Canada Foundation for Innovation (excluding health research)	175	175
Canada Research Chairs (*mature level of support in 2004-05)	60	*300
Genome Canada	32	32
Subtotal	**427**	**667**
Tax measures to assist students and graduates Increase in scholarship exemption to $3,000 from $500	5	30
Tax credit for interest on student loans	150	160
Tuition/education tax credit initiatives	240	250
Subtotal	**395**	**440**
Encouraging families to save for higher education Canada Education Savings Grants (estimate)	744	980
Registered education savings plan (RESP) enhancements	115	150

Subtotal	**859**	**1,130**
Helping Canadians upgrade their skills -Tax-free registered retirement savings plan (RRSP) withdrawals for lifelong learning	45	50
Subtotal	**45**	**50**
TOTAL	**2,419**	**2,980**

The figures are for fiscal year 2001-02, except where noted.
Source: Department of Finance, Canada: retrieved from http://www.fin.gc.ca/activty/pubs/rfi_e.html

And in comparison:

Total Federal Expenditures (Including Recent Investments in Support for Health, Postsecondary Education, Social Assistance and Social Services)	
	2000-01 ($ billions)
Health	3.8
Postsecondary Education	4.5
Social Assistance and Social Services	13.3
TOTAL	**21.6**



How State Tax Dollars Are Spent

Source: National Association of State Budget Officers
Note: Based on data for 1999 – 2000 fiscal year.

OISE/UT 13th Survey Question: What would you like to see happen to government spending for the following purposes?

Public's Views (Selected Years)	Increased %	Keep up with Inflation	Decrease %	Neither/Not Stated	*N*
Total Spending for all purposes					
1990	25	43	29	3	1032
1996	27	41	26	6	1000
2000	53	33	8	7	1002
For all levels of education					
1990	50	38	10	2	1032
1996	48	34	14	4	1000
2000	73	20	3	5	1002
For elementary and high schools					
1990	51	39	8	2	1032
1996	47	35	13	5	1000
2000	71	21	2	7	1002
For community college					
1990	52	35	9	4	1032
1996	45	33	13	9	1000
2000	59	26	2	13	1002
For universities					
1990	52	35	9	4	1032
1996	47	32	13	8	1000
2000	65	23	4	9	1002
For job retraining					
1990	66	24	7	3	1032
1996	64	19	12	6	1000
2000	69	19	4	9	1002
For Adult literacy					
1990	68	24	5	3	1032
1996	60	24	8	8	1000
2000	64	23	4	10	1002

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Human Resources

Section Seven

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In the next five to ten years, those faculty and staff who have been with the colleges since inception, and those who have spent the better part of their careers nurturing the vision, will begin retiring. This is not unique to the college sector. Key positions in every field will require filling, and the contest to secure the best and most qualified will be fierce. For colleges, add to that the impending strain of meeting the demands of staffing for the double cohort. This section looks at key issues in planning for significant personnel changes.

"What's really new about the economy is not the Internet, e-business and dot-coms, even though they are very important. What's really new is that we are shifting from a company-driven economy to a people-driven economy, which means that talented people have much greater choice in where they work and live."[47]

Human Resource Requirements Report for Ontario Colleges of Applied Arts and Technology

SUMMARY

Community colleges anticipate explosive enrolment growth and significant employee retirements over the next five years, while needing to continue to provide employers with a highly skilled, current, and relevant workforce. Under the guidance and direction of a project steering committee established by the Association of Colleges' Human Resources Coordinating Committee, a research team from Georgian College reviewed and analyzed human resource and enrolment data to predict future human resource requirements. Funded by Human Resources Development Canada (HRDC), the research was conducted from March to July 2001.

- **7,111 of the 13,642** (52%) of all full-time college staff will be **eligible** for retirement under one of the three retirement scenarios by December 31, 2006. Specifically, 38% of Support Staff, 54% of Administrative Staff, and 65% of Faculty will be eligible for retirement under one of the three retirement scenarios by December 31, 2006.
- If patterns to date continue, **4,195 of the 13,642** (31%) full-time college staff are **predicted to retire** under one of the three retirement scenarios or 59% of staff who will be eligible.

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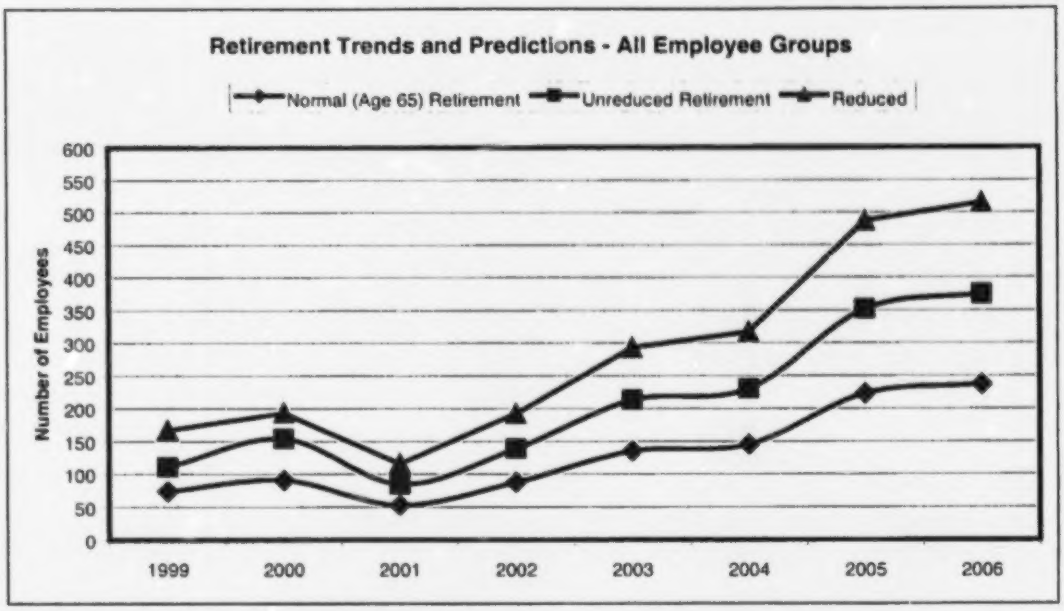
[47] Richard Florida, professor of regional economic development and director of the Software Industry Centre at Carnegie-Mellon University in Pittsburg, as reported by David Crane, The Toronto Star, Business Today, May 12, 2001. C2.



- Based on an expected 32,000 enrolment increase, the increase is expected to be distributed among the four college regions as follows (note that these figures do not include apprenticeship numbers):
    - Central Region: 13,642 students (a 23% increase from Year 2000 enrolment figures)
    - Eastern Region: 7,078 students (a 23% increase from Year 2000 enrolment figures)
    - Northern Region: 3,514 students (a 26% increase from Year 2000 enrolment figures)
    - Western Region: 7,770 students (a 23% increase from Year 2000 enrolment figures)

- The number of additional staff required to accommodate the **increase in enrolment** is forecasted to be **2,919**.

- The total additional staff required both to replace retiring staff and to accommodate the increase in enrolment is **predicted to be 7,114,** with distribution amongst the employee groups as follows:

	# additional staff required to replace retiring staff	# additional staff required to accommodate increased enrolment	Total additional staff required
Support Staff	1,205	1,172	2,377
Administrative Staff	302	332	634
Faculty	2,688	1,415	4,103
Total	**4,195**	**2,919**	**7,114**

- All levels of education are facing a retirement wave. Elementary and secondary schools in Ontario anticipate needing 78,000 new teachers to replace those expected to retire by 2008. By 2011, Ontario universities anticipate needing to hire 10,000 faculty to replace those retiring and to meet the demand of the double cohort.
- Newly created jobs will require post-secondary education and training. New occupations are emerging, however, occupations and industries are also evolving as workplace skills and knowledge change.
- Research on career development and career management indicate that today's workforce have specific expectations of the workplace and their managers.
- In the next few years, colleges face several challenges in this period of retirements, recruitments, retention, and career development expectations.

College Staffing – October 2000

College academic staffing returned to the 1998-99 levels after a brief rise in 1999-2000. Full-time support staff numbers continue to increase, a trend over the past few years.

College Staff by Gender and Type, as of October 2000.

Full-time Staff:	**Male**	**Female**	**Total**
Academic	3,573	2,704	6,277
Support	1,791	3,870	5,661
Administration	637	885	1,522
Total	5,001	3,969	13,460
Part-time Staff:			
Academic	5,311	4,557	9,868
Support	2,182	4,353	6,535
Total	7,493	8,910	16,403

Source: Ontario Council of Regents for College of Applied Arts and Technology Statistics.

Succession Planning Versus Talent Management

Replacement planning "has been seen not only as a means of backfilling critical roles but as a way of ensuring enough focus on the career development of key high-potential individuals. However, many organizations are finding that traditional planning approaches are time-consuming, cumbersome and ineffective in a world of continual organizational change." [48]

Some of the problems in traditional succession planning cited in the article, *Succession Planning* (Canadian HR Reporter), include:

- Too much emphasis is placed on skills and positions needed currently in the organization, without a view to future requirements;
- Often a single source of assessment is used, which may be subject to strong individual opinion;
- The candidate's potential is frequently assessed relative to internal points of comparison – competency standards developed are done without reference to external benchmarks;
- Often lists of high-potential candidates are created, but there is a failure to take action such as reassignment, internal transfer, or formal training.

Successful organizations are progressing towards a more flexible action-oriented process – a talent management approach. Some of the shifts noted in the article include moving from:

- once a year annual planning sessions to continual talent management;
- a private process shrouded in mystery to an open process based on business needs;
- individual development to team or group development;
- a competency focus to emergent capabilities mapped to the business structure;
- a compliant paper-driven process to one that is commitment-driven and interactive; and
- a retroactive focus on what the employee has done, to one focus on what the employee is capable of doing.

In the *"War for Talent"* study conducted jointly by Sibson & Company and McKinsey & Company, research confirmed that meeting career expectations is key in retaining high-potential individuals. Seven key practises were identified that define the winners of the 'talent war':

- A talent mindset – leaders believed that talent matters;
- Distinctive employee value proposition – they have asked themselves 'why would a talented person want to work here?
- A gold standard of talent – they have developed profiles of the kind of people they are after.
- Revealing information about talent – they keep detailed data about the individuals the are losing as well as retaining.
- Talent review forums – use senior management forums to make assessments and decisions for upgrading talent.
- Superior sourcing and selection – successful organizations are always on the hunt for new talent rather than recruiting only to fill specific vacancies.

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[48] Nancy Gore, Succession Planning, Canadian HR Reporter, September 11, 2000, pg. 17

- Learning through work – winning organizations proactively create developmental assignments and plan the movement of high performers in advance.

Selecting Faculty and Staff
For institutions committed to becoming more learning-centred, all new faculty, administrators, and support staff should be selected based on criteria reflecting he new emphasis on learning. Some colleges have developed statements of values regarding their commitment to learning that extends the basic mission statement, and these documents are excellent sources for establishing selection criteria. All new staff should be committed to the culture of placing learning first and should bring skills and competencies related to creating learning for students as their first priority, or at least be willing to develop the appropriate skills and competencies through staff training programs.

Chaffey College in California has created a faculty profile to be used by committees in selecting new faculty. This profile calls for evidence of "ability to facilitate the learning process, commitment to developing learning outcomes and designing alternative approaches to learning, and commitment to integrating new technology into the learning process," among many other criteria.

- ☐ Has the institution completed a study of retirement plans of current faculty and administrators and projected a ten-year replacement program?
- ☐ Have criteria for recruiting and selecting new employees to work in a new learning paradigm been determined and implemented?
- ☐ Have selection committees been trained in applying the criteria?
- ☐ Have the criteria been linked to staff evaluation and staff development programs?

An Inventory for Learning-Centred Colleges, Terry O'Banion, Community College Journal, Teaching and Learning, August/September 2000. Volume 71, Number 1, page 18 – benchmark activity and question to the Learning Revolution, number 3.

"While Canadian universities produce 4,000 PhD graduates a year, they will soon be needing to recruit as many as 3,000 professors annually, largely as a result of retirements. Moreover, firms desperate to meet their immediate needs are offering undergraduates in some fields upwards of $80 K as a starting salary. As a result, many talented young people are not going on to complete Masters and Doctoral level studies, which will exacerbate the shortage of qualified professors." Robert Giroux, President of the Association of Universities and Colleges of Canada, to the Canadian Labour and Business Centre Board Forum on Skills Shortages, October 20, 2000.

REWARDING AND DEVELOPING STAFF IN HIGHER EDUCATION

"*The Investing in Students Task Force – Annotated Bibliography*" describes a government funded incentive scheme from the Higher Education Council for England aimed at the postsecondary sector to promote human resources management and best practice.

Additional funding to enable Higher Education Institutions (HEIs) to support existing investments and create new opportunities in human resources management is contingent on satisfying a number of objectives including clear strategies to address specific staffing issues. Below are highlights from the strategies list:

The strategies should specify how HEIs will:

- address recruitment and retention difficulties in a targeted and cost-effective manner;
- meet specific staff development and training objectives that equip staff to meet current needs and prepare them for future needs;
- develop equal opportunities targets, with programs to implement good practise throughout an institution. This must ensure equal pay for work of equal value, using institution-wide systems of job evaluation;
- achieve regular review of staffing needs, reflecting changes in market demands and technology;
- achieve annual performance reviews of all staff, with rewards connected to individual performance, and where appropriate, to team contribution; and
- provide action plans to tackle poor performance.

* to view the site: http://www.hefce.ac.uk/pubs/hefce/2000/00_56.htm

Retention Becomes a Key Issue as Canada's Workforce Ages

Hay Group Canada, a human resources consulting firm, surveyed more than 1 million workers in 50 countries, finding that about 33 percent of the world' workforce will change jobs during the next 24 months. One of the main factors in the coming shift will be the planned retirement of baby-boomers, but the company's managing director Ron Grey said the loss of skilled talent in declining economic times could seriously harm an organization.

Consequently, firms should try to keep those workers by showing interest in their careers, having a clear sense of direction for the company, offering training relevant to their jobs, maintaining an effective management team, and removing weak performers from non-management positions to show that the company cares about quality work. Hay Group Canada also found that only 17 percent of surveyed employees said they are committed to staying in the same job for the next five years. The remaining 64 percent said their reasons for possibly leaving would include lack of advancement opportunities, respect, coaching, and recognition, as well as not being able to find meaning in their work.

Many of Canada's largest employers find themselves in an unprecedented position. The average age of their employees is in the mid-to-late forties, and in the next five years a significant percentage of the Canadian workforce will retire. Government agencies, public utilities, health-care organizations, oil and gas companies and the education sector are prime examples of industries that need "new blood". Companies are aggressively recruiting graduating students now so they will be ready to fill management positions in the future. Retirement issues have increased in importance to both management (52%) and labour (81%) in recent years. [49]

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[49] Viewpoints 2000; Canadian Labour and Business Centre Leadership Survey.

BOOMERS MAY BE ASKED TO STAY AFTER RETIREMENT

Employers are so short-staffed that they're asking retiring workers to reconsider leaving, a shift from the early 1990s when people with many years of service often found their jobs eliminated.

Today's tight labour market means firms want to retain retirement-age workers' experience and skills. With the first wave of Boomers turning 55 this year, employers are compiling lists of retirees willing to return. Others are offering benefits to retired workers who go part time or are asking those planning to retire to stay.

While a recent downturn in the economy has brought some layoffs, company downsizing has not been widespread enough to indicate whether any specific demographic will be hard hit. So far, experts say employers are continuing to hold on to retirement-age workers because they are loyal, have expertise that is costly to replace and provide networking contacts that can be invaluable.

More than 60% of organizations with a policy on rehiring retirees will bring them back as part-time or temporary workers, according to a soon-to-be-released study by William M. Mercer Co. And 61% will rehire retirees as independent contractors or consultants.

Retirement Ages in Canada

Canada **Both sexes**	**Class of worker: Public sector employees**					
	1976	1980	1986	1990	1996	1999
Average	63.5	63.4	62.3	60.6	59.0	58.5
Median	64.8	64.2	62.8	60.4	59.3	57.2

Canada **Both sexes**	**Class of worker: Private sector employees**					
	1976	1980	1986	1990	1996	1999
Average	65.0	64.8	63.6	63.2	62.5	61.3
Median	65.0	64.9	64.7	63.6	64.0	61.3

Canada **Both sexes**	**Class of worker: Self-employed**					
(including unpaid family workers)	1976	1980	1986	1990	1996	1999
Average	66.4	65.7	66.1	66.0	66.3	65.0
Median	65.6	65.2	65.2	65.3	64.9	64.7

Source: Statistics Canada, Historical labour force - survey

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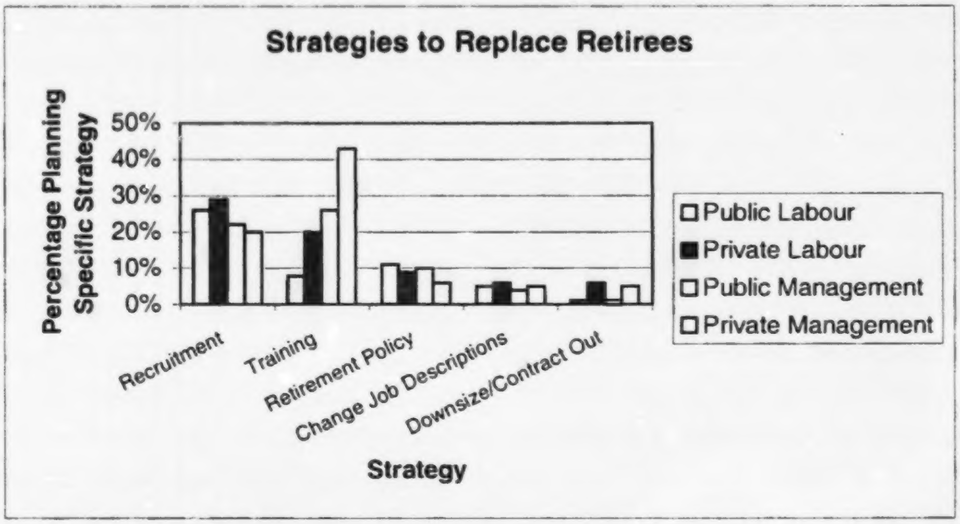
STRATEGIES TO REPLACE RETIREES

Recruitment and training top the actions taken by labour and management in the private and public sector in addressing concerns over Canada's aging workforce. Recruitment has emerged as an important strategy as employers and labour move towards permanently replacing retirees rather than just training the existing workforce.

> Training as a specific action to address the replacement of retirees is seen as a more important activity in the private sector than in the public sector in 2000. Recruitment is slightly more prevalent in the public sector, suggesting that maintaining or increasing the size of the permanent workforce is a strategy in this sector.
> *Analysis of the Viewpoints 2000 Leadership Survey*, Canadian Labour and Business Centre.



Source: Canadian Labour and Business Centre

WHAT MAKES EMPLOYEES STAY AND WHAT DRIVES THEM AWAY?[50]

A new study of Canadian white-collar workers finds that while increased salary may entice someone to a new job, day-to-day tasks and the company mission are key determinants in whether he or she will be content in the position.

The new *World of Work Study* was undertaken for Workopolis (provider of e-cruiting and job search solutions) by Ipsos-Reid and was conducted among 1,000 white-collar workers employed full time. This segment represents 36% of Canadians. This particular working segment was targeted in order to explore the specific issues for professionals, managers (and future managers) working in white-collar environments. The respondents were from across the country and a variety of industries. Some key findings:

- 89% said they were very or somewhat satisfied with their current job;

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[50] © Ipsos-Reid Public Release Date: March 27, 2001

- 65% believed they could find another job right away if they were to lose theirs today;
- 52% agreed that "my career is a big part of who I am."

Why Stay? Why Go?

The same study found a unique relationship between what determined job satisfaction, and what another employer could offer to draw an employee away.

The top five reasons for staying in a job were (in order of importance):

- like the work (78%);
- like the co-workers (68%);
- like the mission and activities of the company (61%);
- learning a lot (57%);
- salary satisfaction (53%)
- Corporate 'culture' ranked 8th with a 37% response.

The top five most appealing offers that another employer could make were (in order):

- promotion from current position (45%);
- profit sharing or stock options (39%);
- fewer work hours (35%);
- opportunity to work one day a week from home (34%);
- different job responsibilities (28%)
- A salary increase of 10% ranked 9th with a 22% response.

The Lure of Money

When asked what salary would be required to prompt a move when the candidate has some uncertainty about the new job, only 35% would change jobs for less than a 30% salary increase. This indicates that the greater certainty about the job opportunity and the company that can be provided in an offer, the lower the salary required to convince an employee to change employers.

When asked what detracts most from their current job, respondents' most frequent choices were:

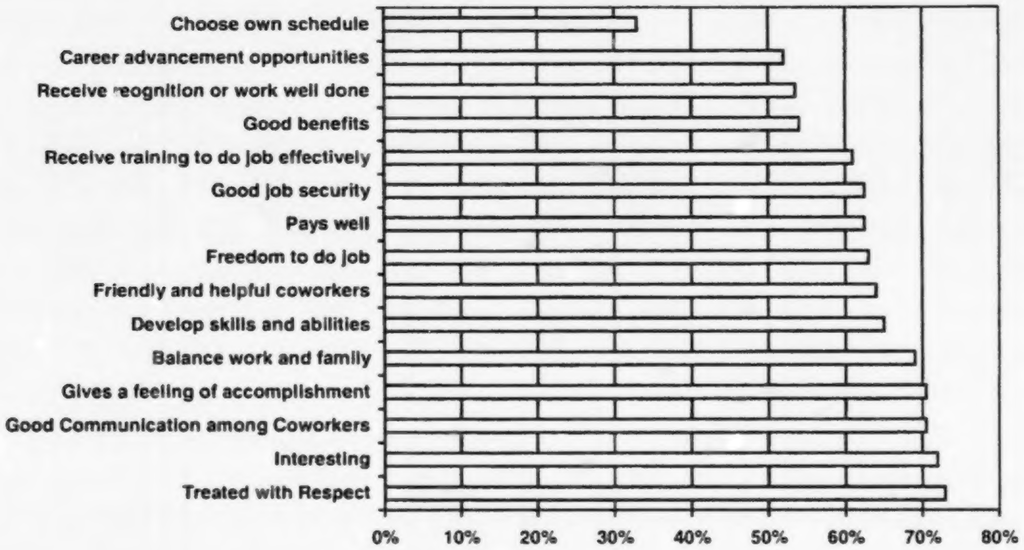
- red tape and bureaucracy (37%)
- office politics (24%)
- paperwork (19%)
- meetings (15%)
- gossip (15%)
- 27% said they experience "a great deal of tension at work"
- 22% say their work often conflicts with personal responsibilities.

Pace of Change

The survey also explored the pace of job changes and found:

- 16% have changed employers within the last two years;
- 35% have changed jobs with the same employer in the last two years;
- 27% said they would likely change employers within the next two years;
- 37% said they would likely change jobs with their current employer in the same period.
- 34% keep their resume up-to-date because "you never know when you might have to look for a new job."

What workers consider "very important" in a job, Canada, 2000



Canadian Labour and Business Centre Leadership Survey 2000 Selected Results for Health/Education/Government		
	Management	Labour
Proportion of Retirees to be replaced		
More than 50%	65%	41%
Less than 50%	34%	50%
Degree of activity in addressing replacement of retirees		
Very actively	27%	20%
Somewhat actively	42%	37%
Specific actions to address replacement of retirees		
Training	26%	9%
Change job descriptions	3%	5%
Downsize/contract out	1%	1%
Retirement policy	10%	11%
None/just talk	9%	24%
Recruitment	22%	26%
Other	28%	24%
Degree of problems expected in replacing retirees		
Very significant problems	22%	38%
Moderately significant problems	58%	43%
No significant problems	20%	19%
Specific replacement problems		
Skill shortages	64%	48%
Level of wages/benefits	11%	20%
Competition with other employees	15%	8%

Parental Leave

The new Act increases unpaid entitlements to 35 weeks from 18 for a birth mother and 37 weeks for the birth father or adoptive parents. The act also replaces the current Employment Standards Act, the One Day's Rest in Seven Act, the Government Contracts Hours and Wages Act, the Employment Agencies Act and Industrial Standards Act.

For a copy of Bill 147 go to: http://www.ontla.on.ca/library/bills/147372.htm

Projected 2001 annual base pay increases and inflation rates for 12 major economies

Country	Blue Collar Employees	White Collar Employees	Management Employees	Top Management	Rate of Inflation
Australia	3.7%	3.9%	4.3%	4.5%	2.4%
Brazil	5.5%	5.5%	5.0%	5.5%	4.0%
Canada	3.4%	3.7%	3.5%	3.0%	2.3%
China	7.9%	9.1%	9.8%	8.3%	1.5%
Germany	2.6%	3.0%	3.4%	3.9%	1.4%
Hong Kong	N/A	4.5%	4.6%	4.6%	1.4%
Japan	3.0%	3.0%	2.6%	3.0%	0.5%
Mexico	14.5%	14.5%	12.5%	12.5%	8.5%
Russia	N/A	4.5%*	4.3%*	6.0%*	18.0%
Singapore	5.1%	5.1%	5.0%	4.9%	1.5%
United Kingdom	3.2%	4.3%	4.6%	5.3%	2.4%
United States	4.1%	4.3%	4.2%	4.4%	2.7%

*Reported as US dollar pay increases

Source: Canadian HR Reporter, January 29, 2001 - (original source: William M. Mercer, Companies LLC, 2001 Global Compensation Planning Report)

Performance-Based Increases and Accountability:

In 2000 the Ontario colleges moved to a performance-based salary compensation program for college administrative staff.

> "From now on, choosing my successor is the most important decision I'll make. It occupies a considerable amount of thought almost every day."
>
> -Jack Welch, CEO, General Electric
> (Quote from 1991 speech--9 years before his anticipated retirement)

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FINANCE

Section Eight

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Among the many opportunities and challenges of the new decade, funding will continue to be one of the major challenges for Ontario's colleges of applied arts and technology. The government announced a three-year funding commitment for colleges and universities in the May 2001 budget that is unprecedented.

In this section, the various sources of funding will be reviewed along with a look at how the colleges spend their revenue.

Funding - Postsecondary Transfer Payments/Operating Grants

In May 2001, the Minister of Training, Colleges and Universities announced that the total operating grant in 2001-02 to support enrolment growth would be $717,649,000, up $12,600,000 from the 2000-01 allocation. In addition, a total of $18,000,000 would be provided for the Access to Opportunities Program. While the three-year commitment is significant for the colleges, it continues to fall short in the meeting the needs of the colleges.

Figure 8.1

Components	2000-01 Budget	2001-02 Budget	% Change
General Purpose Grant	$632,091,106	$644,732,928	2%
Special Purpose Grant	$59,118,394	$56,524,172	-3.6%
Performance Funding	$14,000,000	$16,391,400	14.6%
Total Transfer Payment	**$705,209,500**	**$717,649,500**	**1.7%**
Access to Opportunities Program	$17,069,512	$18,200,000	6.2%
Nursing Diploma Final Intake	N/A.	$10,000,000	
Nursing Baccalaureate (start-up)	$10,000,000	$5,000,000	

Source: Ministry of Training, Colleges and Universities

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TRANSFER PAYMENT COMPARISONS (2000-01 and 2001-02)

Northern grants were increased by $400,000 (10%). An allocation of $10 million was made to fund spaces in the final intake of diploma nursing. The government also provided additional funding of $10,000 to increase the final Nursing Diploma intake for 2001-02.

PERFORMANCE FUNDING

The minister also announced an increase of $2.4 million in performance funding to $16.4 million (or 2.33%) of the college operating grant . Three Key Performance Indicators are being used to calculate performance funding: graduate employment, graduate satisfaction and employer satisfaction.

In the first year of the implementation of performance funding, the colleges were divided into three groups based on the key performance indicator results and the funding was divided between the top two groups, with the top group receiving twice as much funding as the middle group based on percentage of activity base from total activity base for the top 2/3 of colleges. There were significant concerns over the appropriateness of the performance funding distribution for 1999-2000.

The distribution mechanism was revised:
Step 1: The available funding divided among the the 3 KPI's,
Step 2: Through 4 are calculated separately for each of the 3 KPI tied to funding.
Step 3: The college KPI activity base is calculated.
Step 4: Each college's Share of KPI Activity is calculated.
Step 5: The college employment rate is adjusted.

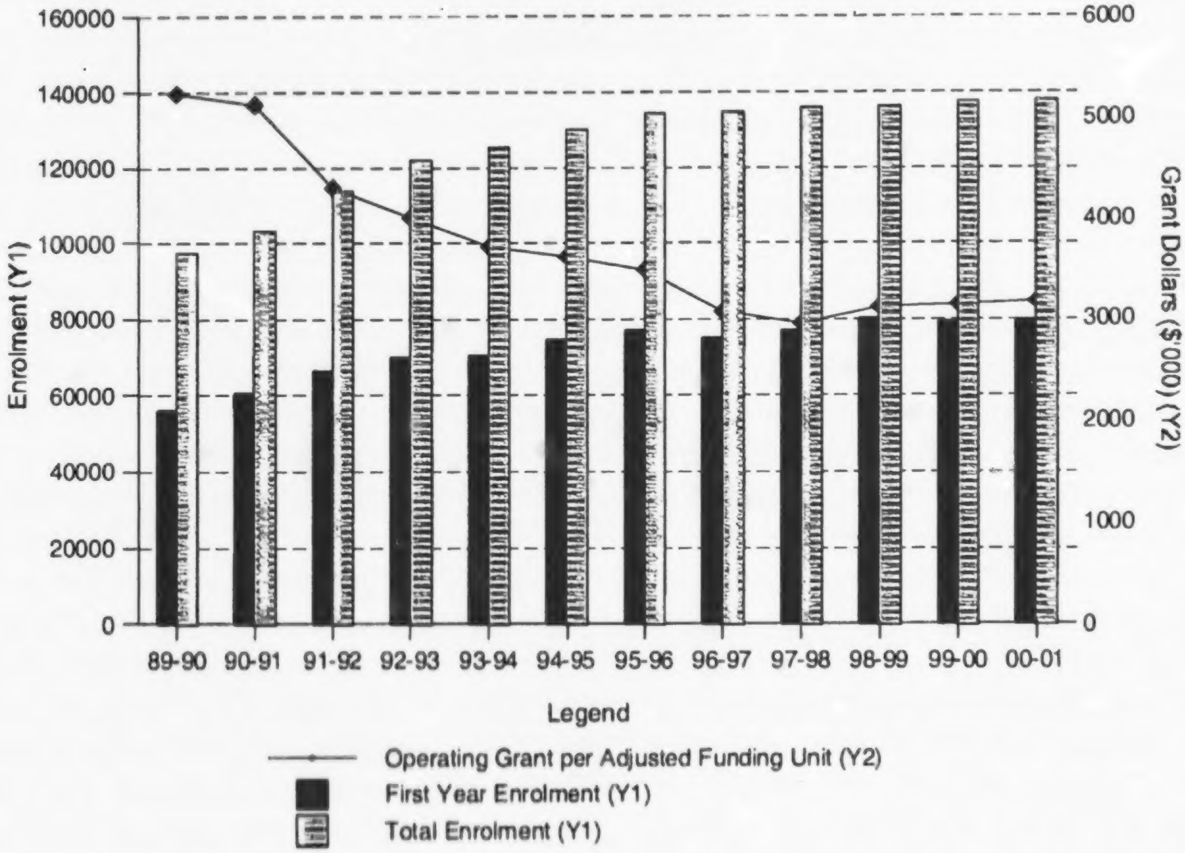
The amount for each college from Steps 2-4 are added to determine the total KPI grant. Further information on Key Performance Indicators is available at www.acaato.on.ca under the KPI link.

See also Appendix 8.4 *General Purpose Operating Grants vs. Total Operating Grants to Colleges* at the end of the section for historical information on operating grants

OPERATING GRANTS PER FULL-TIME COLLEGE STUDENT

College activity has continued to grow through the last decade but government funding did not keep pace with the growth. As a result, the operating grant per weighted funding unit has decreased significantly, down 42% from $5,234 to approximately $2,950 in 1997-98. It has risen slowly in the past few years, up to $3,174 in 2000-01. It is projected to rise again in 2001-02.

Full-time Post-secondary Enrolment & The General Purpose Operating Grant
Figure 8.2



The continuing increase in enrolment in colleges has been beneficial to the increasing number of Ontario residents seeking access to further education and training. But it has caused significant strain within the college system. There is much competition for available dollars and colleges have been forced to look elsewhere to find the necessary funds for program delivery. *See also Appendix 8.6 for the numerical table from which the above graph was developed.*

College System Revenue and Expenditures

The table below shows the sources of the colleges' revenue and how the revenue sources have changed over time.

Figure 8.3
College System Revenue

REVENUE SOURCE	1993-94 millions	1994-95 millions	1995-96 millions	1996-97 millions	1997-98 millions	1998-99 millions	1999-2000 millions
General Purpose	708.3	696.9	691.7	597.6	591.7	616.6	630.0
Skills Training: Federal	95.1	95.5	79.3	57.0	57.7	89.6	79.4
Skills Training: MTCU	167.9	185.7	169.3	108.8	70.6	74.4	82.4
Skills Training: Other	117	122.6	114.0	96.5	101.0	13.4	25.2
Specific Purpose	112.7	101	110.5	87.1	81.0	82.2	81.8
Capital Grants	59	29.8	84.1	29.0	46.2	6.2	14.3
Tuition Fees	231.3	245	275.2	309.3	347.6	387.4	444.6
Ancillary Income	126.4	129	132.6	124.1	133.4	145.6	158.2
Other Income	68.5	78.9	76.5	80.0	105.9	212.7	213.1
TOTAL:*	**1,686.2**	**1,684.4**	**1,733.2**	**1,489.4**	**1,535.1**	**1,628.0**	**1.729.0**

Source: Ontario Ministry of Training, Colleges and Universities, College Financial Information Systems, Summary Report, August 2000.
Notes: Due to differing accounting and reporting methodologies used, CFIS revenues ascribed to an identified funding agency or source may not reconcile precisely with the accounts of the agency and source for a given year.
* Total Revenue is taken directly from CFIS reports. Revenue Sources may not add up due to rounding.

All government sources of revenue at both the federal and provincial levels have decreased over a number of years as the first six rows above indicate.

Tuition fees, ancillary income and other income have all increased in an effort to offset the decline in government funding. Tuition fees paid by students have increased significantly in the past three years.

FUNDING FOR TRAINING

With the reduction in government funding for training activities, as shown above, colleges struggle to meet the growing demand and need for job-oriented training.

Apprenticeship combines on-the-job training (75-90% of total) with classroom training (10-25%) in skilled trades and occupations. In 2000- 2001, the Ministry of Training, Colleges and Universities provided $51.4 million to serve 52,000 active apprentices and 22,000 employers. For 2001-02, the government has committed $45.4 million.
Appendix 8.8 *Apprenticeship in School 2000-01 by Sector* shows the number of training days purchased through the college system and through other trainers. Colleges continue to be the major provider of apprenticeship in the province. Part-time delivery of the in-school portion of apprenticeship continues to grow in popularity.

Appendix 8.9 shows the breakdown of apprentices by sector and gender.

The Ministry of Training, Colleges and Universities, Training Division also provides:

- literacy and basic skills training primarily to unemployed adults with $60.5 million(down approximately $2 million) for 68,000 people (up 13,000) at over 300 sites, including colleges, in 1999-2000. Approximately the same amount will be available in 2001-02.

- an adjustment advisory program serving 30,000 clients for 2000-2001 with a budget of $2.9 million to help firms, workers and communities adjust to real or threatened job loss (again more clients, 3,00 with less money $600 thousand).

- $1.4 million will again be available in 2000-2001 to provide assistance to industry sectors and organizations for the development of training programs, standards, and materials to address skill gaps.

- assistance to unemployed, out-of-school youth, ages 15-24, through Job Connect which contracts with colleges and non-profit organizations to provide job orientation training and/or on-the-job training for approximately 120,000 clients at a cost of $108.5 million in 2000-2001.

The province continues to negotiate with the federal government to finalize a *Canada-Ontario Labour Market Development Agreement (LMDA),* but there has been limited progress in the past year. In the absence of such an agreement, the province negotiates a yearly Contribution Agreement. Under this agreement, the federal government will transfer up to $50 million in

2000-01 to cover the costs of training E.I. recipients in colleges. Annual negotiations hamper colleges in planning for needs and changing requirements.

OTHER FUNDING

The **Strategic Skills Investment** initiative was announced in the 1998 Budget as a one-year $30 million initiative. The 1999 budget announced a multi-year extension and added an additional $100 million. The focus is on creating strategic skills essential for building business competitiveness and increasing the responsiveness of Ontario's training institutions to business needs.

Investment in Strategic Skills to-date is $62 million for 38 new training projects and $176 million leveraged from project partners in business and education. Business sectors extend from photonics to heavy equipment. Over 325 companies and 90 business associations and organizations are involved. Some 56 colleges, universities and other public and private sector training providers are participating. Clients of the approved training include young people preparing to enter the full-time workforce, experienced workers seeking to expand their skills and unemployed or under-employed people reorienting their skills to qualify for good jobs in fast growing sectors.

OTHER CAPITAL PROJECTS

Funds for the facilities renewal and modernization program were distributed by the traditional formula, approximately 1/3 for colleges and 2/3 for universities.

Appendix 8.1 College System Revenue & Expenditures 1999-2000

Item	Revenue	Expenditures
General Purpose Operating Grant	$630,002,940	
Adult Training: Federal	$79,402,625	
Adult Training: MTCU	$83,887,331	
Adult Training: Other Contracts	$13,908,416	
Tuition Fees	$396,225,313	
Total "Teaching Related" Revenue	**$1,203,426,625**	
Academic Salaries & Benefits (FT & Other) % of Teaching Related Revenue		$562,350,028 46.7%
Support Salaries & Benefits (FT & Other)* % of Teaching Related Revenue		$289,430,932 24.05%
Admin. Salaries & Benefits (FT) * % of Teaching Related Revenue		$131,909,568 10.9%
Specific Purpose Operating Grants	$81,844,226	
Capital Grants	$14,285,535	
Ancillary Income	$158,229,832	
Other Income	$215,220,557	
Total "Infrastructure" Revenue	**$469,580,150**	
Non-Labour Operating Costs		$564,542,294
Non-Labour Capital Costs		$5,845,980
Remaining Support Salaries & Benefits		$28,297,019
Remaining Admin. Salaries & Benefits		$5,761,180
Student Stipends & Allowances		$26,065,536
Totals:	**$1,673,006,775**	**$1,614,202,537**

Source Ontario Ministry of Training, Colleges and Universities. *College Financial Information System, 1998-99 Report*. August 2000

Notes* calculated as total support or admin. salaries and benefits, less that which was unallocated to the teaching function.

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Appendix 8.2 Staff Compensation Costs: 1999-2000

Full-time Employees:

Academic Staff	$383,427,834	Full-time salaries
	3,927,529	Co-ordinators
	2,409,960	Overtime
	3,520,682	Professional development leave
	10,029,692	Termination gratuities
	64,769,327	Benefits and pensions
	$468,085,024	
Support Staff	$191,400,662	Full-time salaries
	3,970,771	Overtime
	148,615	Professional development leave
	400,564	Termination gratuities
	39,293,146	Benefits and pensions
	$235,213,758	
Administrative Staff	$108,597,656	Full-time salaries
	56,826	Professional development leave
	1,129,613	Termination gratuities
	18,438,493	Benefits and pensions
	$128,222,588	

Part-time Employees:

Academic Staff	$24,609,070	Sessional salaries
	27,584,042	Partial load salaries
	60,407,908	Part-time hourly salaries
	9,961,003	Benefits and pensions
	$122,562,023	

Administrative Staff	$8,678,213	Salaries
	769,947	Benefits
Support Staff	$75,533,411	Salaries
	6,980,782	Benefits
Other	$22,592,125	Allowances and benefits
	3,473,411	Special support allowance
TOTAL COMPENSATION	$1,072,111,282	

Source: Ontario Ministry of Training, Colleges and Universities, *College Financial Information System, 1998-99 Report*. August 2000

Appendix 8.3
Changes to Non-Labour Costs 1997-98 to 1998-99

Operating

Type of Costs	Expenditures 1998-99 ($)	Expenditures 1999-2000 ($)	% Change
Instructional Supplies	47,140,892	47,927,898	1.67
Field Work	2,214,546	2,449,031	10.59
Memberships & Dues	2,279,502	2,528,946	10.94
Staff Employment	1,024,502	1,183,599	15.53
Professional Development	4,595,126	5,024,501	9.34
Travel	14,701,831	16,673,059	13.41
Promotion / Public Relations	21,812,879	25,371,078	16.31
Maintenance, Supplies & Vehicles	90,119,459	85,284,056	-5.37
Telecommunications	12,513,435	13,507,010	7.94
Insurance	5,062,341	5,314,286	4.98
Audit & Professional Fees	12,496,080	13,242,360	5.97
Contracting (various)	74,679,040	94,236,516	26.19
Electricity, Fossil Fuels, Water, Refuse	29,076,697	31,745,043	9.18
Taxes & Bank Charges	29,002,111	18,720,029	-35.45
Cost of Goods Sold - Anc. Op.	51,574,583	62,070,390	20.35
Scholarships, Bursaries, Awards	10,090,861	13,214,137	30.95
Student Assistance from Tuition	16,053,451	23,117,394	44.0
Depreciation Expense	86,593,578	95,847,347	10.69
Miscellaneous	12,159,937	7,085,614	-41.73
Total Operating Costs:	**523,192,849**	**564,542,294**	**7.9**

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Appendix 8.3
Changes to Non-Labour Costs 1997-98 to 1998-99 (con't)

Capital

Type of Costs	Expenditures 1998-99 ($)	Expenditures 1999-2000 ($)	Change (%)
Rental – furniture & equipment	11,063,818	11,423,622	3.25
Purchase – furniture & equipment	6,464,061	5,605,171	-13.29
Premise Rental	13,347,069	15,578,027	16.71
*Building, site and leasehold improvements***	2,545,145	N/A.	
*Premise maintenance, and equipment purchases that are not capitalized***	4,759,577	N/A.	
Long-Term Debt Interest	6.050,795	8,200,137	35.52
Instructional Information Technology Rentals	N/A.	6,984,451	
Instructional Information Technology Purchases	N/A.	10,354,572	
Total Capital Costs:	**44,330,465**	**58,145,980**	

Source: Ontario Ministry of Training, Colleges and Universities. *College Financial Information System, 1998-99 Report*. August 2000

** Effective April 1, 1997, based on the Canadian Institute for Chartered Accountants, new accounting recommendations for not-for-profit organizations, capital assets are no longer expensed as acquired, but are now depreciated over their useful life.

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Appendix 8.4

General Purpose Operating Grant

vs.

Total Operating Grants to Colleges

YEAR	General Purpose Operating Grant (GPOG)	Total Operating Grants (TOG)	GPOG as a Percentage of TOG
1987-88	586,836,175	625,600,000	93.8%
1988-89	613,243,803	661,700,000	92.7%
1989-90	645,773,556	700,400,000	92.2%
1990-91	685,039,064	771,500,000	88.8%
1991-92	723,192,315	826,900,000	87.5%
1992-93	739,947,106	868,400,000	85.2%
1993-94	700,747,370	808,200,000	86.7%
1994-95	690,747,370	807,900,000	85.5%
1995-96	684,961,891	809,200,000	84.6%
1996-97	597,621,175	688,781,299	86.8%
1997-98	581,595,887	686,461,500	84.7%
1998-99	612,153,320	692,586,500	88.4%
1999-2000	625,091,106	692,049,500	90.3%
2000-01	632,091,106	705,209,500	89.6%
2001-2002	644,732,928	717,649,500	89.8%

Source: Ontario Ministry of Training, Colleges and Universities, Colleges Branch
Note: The GPOG for 1993-94 through 1995-96 was reduced by $40 million to reflect the social contract.

Appendix 8.5

Activity Base Funded by the General Purpose Operating Grant

YEAR	Activity Base (converted to Funding Units)							
	Full-Time Post-secondary	Index of Activity (1986-87=100)	Full-Time Tuition Short	Index of Activity (1986-87=100)	Part-Time Post-secondary	Index of Activity (1986-87=100)	Part-Time Non-Post-secondary	Index of Activity (1986-87=100)
1986-87	100,830.8	100.0%	5,295.5	100.0%	8,935.2	100.0%	5,896.9	100.0%
1988-89	100,030.4	99.2%	5,879.8	111.0%	9,336.2	104.5%	6,681.1	113.3%
1989-90	102,215.8	101.4%	5,638.5	106.5%	8,827.7	98.8%	6,703.2	113.7%
1990-91	109,554	108.7%	6,922.2	130.7%	9,827.8	110.0%	7,369.1	125.0%
1991-92	141,657.5	140.5%	8,087.9	152.7%	10,969.5	122.8%	7,642.4	129.6%
1992-93	151,589.1	150.3%	8,528.6	161.1%	15,100.3	169.0%	9,790.6	166.0%
1993-94	156,745.3	155.5%	8,322.9	157.2%	14,632.5	163.8%	9,231.5	156.5%
1994-95	161,087.1	159.8%	7,920.3	149.6%	13,761.3	154.0%	8,435.7	143.1%
1995-96	169,269.6	167.9%	7,344.5	138.7%	13,455.1	150.6%	8,618.0	146.1%
1996-97	167,756.3	166.7%	6,020.8	113.7%	12,579.8	140.8%	8,030.6	136.2%
1997-98	171,072.4	169.9%	5,627.1	106.3%	12,278.7	137.4%	8,010.9	135.8%
1998-99	172,587.4	171.2%	4,775.8	90.2%	13,253.6	148.3%	7,666.4	130.0%
1999-2000	174,543	173.1%	3688.3	69.6%	13,402.3	149.9%	7,457.4	126.4%

Part-Time Post-secondary includes:	Mandatory Post-secondary; Post-secondary Electives; Post-diploma Health
Part-Time Non-Post-secondary includes:	Basic Communication and Numeric Skills; Occupational Certification; Prior Learning Assessment (as of 1993-94); Miscellaneous; Tuition Short Courses; Other Vocational; Ontario Management Development Program (OMDP)

Note: New program weights for full-time post-secondary introduced 1991-92. New part-time conversion formula introduced in1992-93.
Source: Ontario Ministry of Training, Colleges and Universities, Colleges Branch

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Appendix 8.6

General Purpose Operating Grants

Fiscal Year	Activity Base [1] (Weighted Funding Units supported by grant)	General Purpose Operating Grant [2]	Grant per Weighted Funding Unit [3]
1989-90	123,385.2	645,773,556	$5,234
1990-91	133,673.1	685,039,064	$5,125
1991-92 [4]	168,357.3	723,192,315	$4,296
1992-93	185,008.6	739,947,106	$4,000
1993-94	188,932.2	700,747,370	$3,709
1994-95	191,204.4	690,747,370	$3,613
1995-96	196,667.8	684,961,891	$3,483
1996-97	194,537.8	597,621,175	$3,072
1997-98	197,157.8	581,595,887	$2,950
1998-99	196,671.4	612,153,320	$3,113
1999-2000	199,090.8	625,091,106	$3,139

Projected

2000-01 [5]	199,090.8	632,091,106	$3,174
2001-2002 [5]	199,090.8	$644,732,928	$3,238

Source: Ontario Ministry of Training, Colleges and Universities, Colleges Branch.

Notes

1. Derived from annual audit of enrolment report. The number shown represents the reported weighted funding units for the activity year, not the two or three year historical average used in the actual grant calculation
2. Does not include special purpose grants. General Purpose Grant allocation for 1993-94 to 1995-96 was reduced by $40 million to reflect the impact of the Social Contract reduction. GPOG allocation for 1997-98 does not include the amount set aside for the Strategic Programs Investment Fund or Common Information Systems. In 1998-99, the GPOG allocation does not include the set-aside for ministry initiatives.
3. Not adjusted for inflation or to reflect the additional impact of geographic and economy of scale adjustments included in the annual grant calculation.
4. 1991-92 first activity year with new program weights. Introduction caused an inflation in the number of weighted funding units.
5. Assumes flat line enrolment.

Appendix 8.7

Apprenticeship Training in Ontario

Training Days Purchased

YEAR	CAATs		NON-CAAT TRAINERS		TOTAL
	Full-Time	Part-Time	Full-Time	Part-Time	
1988-89	789,462	116,833	1,560	0	907,855
1989-90	777,991	122,407	7,560	589	908,547
1990-91	972,237	123,363	15,033	2,140	1,112,773
1991-92	977,053	107,480	24,643	2,179	1,111,355
1992-93	834,143	100,129	33,878	2,187	970,337
1993-94	723,770	81,867	33,088	411	839,136
1994-95	661,217	100,098	34,432	60	795,807
1995-96	627,385	134,117	26,442	449	788,393
1996-97	517,493	139,859	27,135	1,273	685,760
1997-98	488,503	187,980	39,131	1,858	717,472
1998-99	494,763	228,634	51,026	1,367	775,790
1999-2000	464,759	247,234	50,216	711	762,920
2000-01	480,642	259,318	46,116	516	786,592
Planned					
2001-2002	503,684	315,358	81,818	1,049	901,909

Source: 1989-1992 - Ontario Ministry of Skills Development, Apprenticeship and Client Services
1993-1998 - Ontario Ministry of Education and Training, Workplace Support Services
1998-2001 - Ontario Ministry of Training, Colleges and Universities

Appendix 8.8

Apprenticeship In-school 2000-01 By Sector

Actual Training Days*

SECTOR	COLLEGE		NON-COLLEGE		TOTAL	
	Full-Time	Part-Time	Full-Time	Part-Time	Full-Time	Part-Time
Construction	224,005	22,793	39,200	0	263,205	22,793
Industrial	43.935	121,359	0	225	43,935	121,584
Motive Power	158,902	55,629	0	0	158,902	55,629
Service	37,335	13,789	0	291	37,335	14,080
Other	16,465	45,749	6,916	0	23,381	45,749
Total	480,642	259,318	46,116	516	526,758	259,834

* Not final (enrolment still to be validated for 31 college classes)

Appendix 8.9

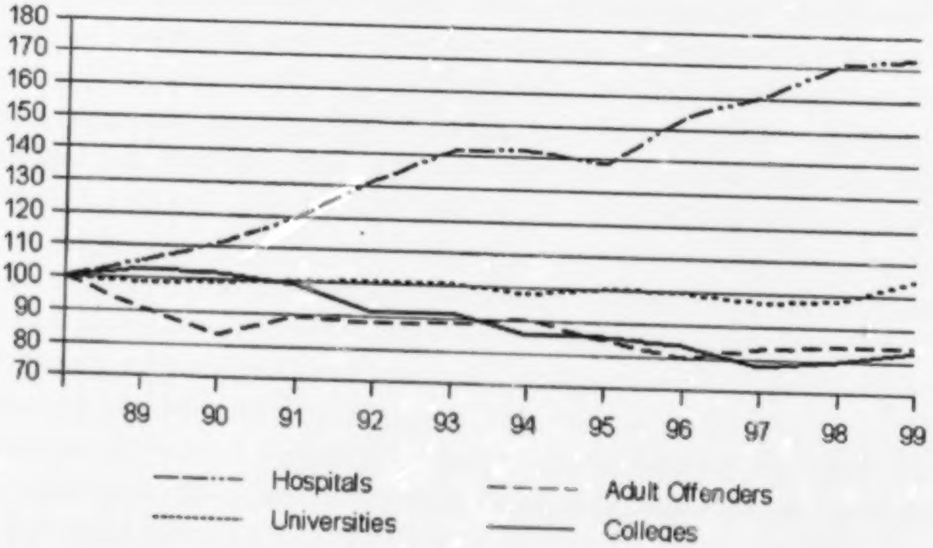
Active Apprentices by Sector

August 1, 2000

SECTOR	MALE	FEMALE	TOTAL
Construction	17,591	289	17,880
Industrial	9,597	205	9,802
Motive Power	11,199	172	11,371
Service	2,966	4,363	7,329
Other	4,219	1,390	5,609
Sub-Total	45,572	6,419	51,991

Source: Ontario Ministry of Training, Colleges and Universities, Training Division, August 2001.

Appendix 8.10
Expenditures per Client
Colleges and Three other Public Sectors in Ontario



Adapted from: **Ontario Universities- 1998 Resource Document**

Notes:

Hospitals: Total operating costs per patient day based on CIHI & OHA data
Colleges: Operating revenue per provincially funded FTE student
Universities: Operating expenses per FTE Universities 1996/97 COU Estimate
Adult Offenders; Expenditures per inmate-day

Sources:

Hospitals: 1994/95 Statistics Canada, 1995/6Canadian Institute for Health Information,
Colleges: Ministry of Training, Colleges and
Universities: COFO-OU, financial Report of Ontario Universities
Adult Offenders: Ministry of Correctional Services

The 2002 Environmental Scan
for the
Colleges of Applied Arts and Technology of Ontario

Feedback Form

The 2002 Environmental Scan has been revised to incorporate a number of suggestions that were received last year. We continue to need your feedback to ensure that the document meets the needs of the college system. Please forward your thoughts and comments to Pam Derks, Director, Research and Policy at:

The Association of Colleges of Applied Arts and Technology
655 Bay Street, Suite 1010
Toronto, Ontario
M5G 2K4

derks@acaato.on.ca • (416) 596-0744, ext. 230• fax; (416) 596-2364

1. How have you used the scan in your own work?

2. What did you find to be the most useful components of the scan?

3. What additional information or format change would have been helpful to you?

4. Other Comments:

Name:______________________________

College/Organization:__________________________________

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